Response to Request for Proposal

For

Documents and Records Management
RFP# 01-18

Submitted to:

National Cooperative Purchasing Alliance

Submission Date:
Tuesday, March 20th, 2018
2:00 PM CST

Submitted By:
Tab 1 - Master Agreement General Terms and Conditions

- **Customer Support**
  - The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request.

- **Assignment of Contract**
  - No assignment of contract may be made without the prior written approval of Region 14 ESC. Awarded vendor is required to notify Region 14 ESC when any material change in operation is made.

- **Disclosures**
  - Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.
  - The respondent affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.

- **Renewal of Contract**
  - Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew annually for an additional two (2) years if agreed to by Region 14 ESC and the vendor.

- **Funding Out Clause**
  - Any/all contracts exceeding one (1) year shall include a standard “funding out” clause. A contract for the acquisition, including lease, of real or personal property is a commitment of the entity’s current revenue only, provided the contract contains either or both of the following provisions:
    - Retains to the entity the continuing right to terminate the contract at the expiration of each budget period during the term of the contract and is conditioned on a best efforts attempt by the entity to obtain appropriate funds for payment of the contract.

- **Shipments (if applicable)**
  - The awarded vendor shall ship ordered products within seven (7) working days for goods available and within four (4) to six (6) weeks for specialty items after the receipt of the order unless modified. If a product cannot be shipped within that time, the awarded vendor shall notify the entity placing the order as to why the product has not shipped and shall provide an estimated shipping date. At this point the participating entity may cancel the order if estimated shipping time is not acceptable.
• Tax Exempt Status
  ➢ Since this is a national contract, knowing the tax laws in each state is the sole responsibility of the vendor.

• Payments
  ➢ The entity using the contract will make payments directly to the awarded vendor or their affiliates (distributors/business partners/resellers) as long as written request and approval by NCPA is provided to the awarded vendor.

• Adding authorized distributors/dealers
  ➢ Awarded vendors may submit a list of distributors/partners/resellers to sell under their contract throughout the life of the contract. Vendor must receive written approval from NCPA before such distributors/partners/resellers considered authorized.
  ➢ Purchase orders and payment can only be made to awarded vendor or distributors/business partners/resellers previously approved by NCPA.
  ➢ Pricing provided to members by added distributors or dealers must also be less than or equal to the pricing offered by the awarded contract holder.
  ➢ All distributors/partners/resellers are required to abide by the Terms and Conditions of the vendor's agreement with NCPA.

• Pricing
  ➢ All pricing submitted shall include the administrative fee to be remitted to NCPA by the awarded vendor. It is the awarded vendor's responsibility to keep all pricing up to date and on file with NCPA.
  ➢ All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing

• Warranty
  ➢ Proposals should address each of the following:
    ▪ Applicable warranty and/or guarantees of equipment and installations including any conditions and response time for repair and/or replacement of any components during the warranty period.
    ▪ Availability of replacement parts
    ▪ Life expectancy of equipment under normal use
    ▪ Detailed information as to proposed return policy on all equipment

• Indemnity
  ➢ The awarded vendor shall protect, indemnify, and hold harmless Region 14 ESC and its participants, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from the actions of the vendor, vendor employees or vendor subcontractors in the preparation of the solicitation and the later execution of the contract.
Franchise Tax
- The respondent hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes.

Supplemental Agreements
- The entity participating in this contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor.

Certificates of Insurance
- Certificates of insurance shall be delivered to the Public Agency prior to commencement of work. The insurance company shall be licensed in the applicable state in which work is being conducted. The awarded vendor shall give the participating entity a minimum of ten (10) days notice prior to any modifications or cancellation of policies. The awarded vendor shall require all subcontractors performing any work to maintain coverage as specified.

Legal Obligations
- It is the Respondent's responsibility to be aware of and comply with all local, state, and federal laws governing the sale of products/services identified in this RFP and any awarded contract and shall comply with all while fulfilling the RFP. Applicable laws and regulation must be followed even if not specifically identified herein.

Protest
- A protest of an award or proposed award must be filed in writing within ten (10) days from the date of the official award notification and must be received by 5:00 pm CST. Protests shall be filed with Region 14 ESC and shall include the following:
  - Name, address and telephone number of protester
  - Original signature of protester or its representative
  - Identification of the solicitation by RFP number
  - Detailed statement of legal and factual grounds including copies of relevant documents and the form of relief requested
- Any protest review and action shall be considered final with no further formalities being considered.

Force Majeure
- If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer
period, and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.

The term Force Majeure as employed herein, shall mean acts of God, strikes, lockouts, or other industrial disturbances, act of public enemy, orders of any kind of government of the United States or any civil or military authority; insurrections; riots; epidemics; landslides; lighting; earthquake; fires; hurricanes; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; explosions, breakage or accidents to machinery, pipelines or canals, or other causes not reasonably within the control of the party claiming such inability. It is understood and agreed that the settlement of strikes and lockouts shall be entirely within the discretion of the party having the difficulty, and that the above requirement that any Force Majeure shall be remedied with all reasonable dispatch shall not require the settlement of strikes and lockouts by acceding to the demands of the opposing party or parties when such settlement is unfavorable in the judgment of the party having the difficulty.

• Prevailing Wage

It shall be the responsibility of the Vendor to comply, when applicable, with the prevailing wage legislation in effect in the jurisdiction of the purchaser. It shall further be the responsibility of the Vendor to monitor the prevailing wage rates as established by the appropriate department of labor for any increase in rates during the term of this contract and adjust wage rates accordingly.

• Miscellaneous

Either party may cancel this contract in whole or in part by providing written notice. The cancellation will take effect 30 business days after the other party receives the notice of cancellation. After the 30th business day all work will cease following completion of final purchase order.

• Open Records Policy

Because Region 14 ESC is a governmental entity responses submitted are subject to release as public information after contracts are executed. If a vendor believes that its response, or parts of its response, may be exempted from disclosure, the vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 14 ESC must provide the OAG sufficient information to render an opinion and therefore, vague and general claims to confidentiality by the respondent are not acceptable. Region 14 ESC must comply with the opinions of the OAG. Region14 ESC assumes no responsibility for asserting legal arguments on behalf of any vendor. Respondent are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.
**Process**

Region 14 ESC will evaluate proposals in accordance with, and subject to, the relevant statutes, ordinances, rules, and regulations that govern its procurement practices. NCPA will assist Region 14 ESC in evaluating proposals. Award(s) will be made to the prospective vendor whose response is determined to be the most advantageous to Region 14 ESC, NCPA, and its participating agencies. To qualify for evaluation, response must have been submitted on time, and satisfy all mandatory requirements identified in this document.

- **Contract Administration**
  - The contract will be administered by Region 14 ESC. The National Program will be administered by NCPA on behalf of Region 14 ESC.

- **Contract Term**
  - The contract term will be for three (3) years starting from the date of the award. The contract may be renewed for up to two (2) additional one-year terms.
  - It should be noted that maintenance/service agreements may be issued for up to (5) years under this contract even if the contract only lasts for the initial term of the contract. NCPA will monitor any maintenance agreements for the term of the agreement provided they are signed prior to the termination or expiration of this contract.

- **Contract Waiver**
  - Any waiver of any provision of this contract shall be in writing and shall be signed by the duly authorized agent of Region 14 ESC. The waiver by either party of any term or condition of this contract shall not be deemed to constitute waiver thereof nor a waiver of any further or additional right that such party may hold under this contract.

- **Products and Services additions**
  - Products and Services may be added to the resulting contract during the term of the contract by written amendment, to the extent that those products and services are within the scope of this RFP.

- **Competitive Range**
  - It may be necessary for Region 14 ESC to establish a competitive range. Responses not in the competitive range are unacceptable and do not receive further award consideration.

- **Deviations and Exceptions**
  - Deviations or exceptions stipulated in response may result in disqualification. It is the intent of Region 14 ESC to award a vendor's complete line of products and/or services, when possible.

- **Estimated Quantities**
  - The estimated dollar volume of Products and Services purchased under the proposed Master Agreement is $2 million dollars annually. This estimate is based on the anticipated volume of Region 14 ESC and current sales within the NCPA program. There is no guarantee or commitment of any kind regarding usage of any contracts resulting from this solicitation.
• Evaluation
  ➢ Region 14 ESC will review and evaluate all responses in accordance with, and subject to, the relevant statutes, ordinances, rules and regulations that govern its procurement practices. NCPA will assist the lead agency in evaluating proposals. Recommendations for contract awards will be based on multiple factors, each factor being assigned a point value based on its importance.

• Formation of Contract
  ➢ A response to this solicitation is an offer to contract with Region 14 ESC based upon the terms, conditions, scope of work, and specifications contained in this request. A solicitation does not become a contract until it is accepted by Region 14 ESC. The prospective vendor must submit a signed Signature Form with the response thus, eliminating the need for a formal signing process.

• NCPA Administrative Agreement
  ➢ The vendor will be required to enter and execute the National Cooperative Purchasing Alliance Administration Agreement with NCPA upon award with Region 14 ESC. The agreement establishes the requirements of the vendor with respect to a nationwide contract effort.

• Clarifications / Discussions
  ➢ Region 14 ESC may request additional information or clarification from any of the respondents after review of the proposals received for the sole purpose of elimination minor irregularities, informalities, or apparent clerical mistakes in the proposal. Clarification does not give respondent an opportunity to revise or modify its proposal, except to the extent that correction of apparent clerical mistakes results in a revision. After the initial receipt of proposals, Region 14 ESC reserves the right to conduct discussions with those respondent's whose proposals are determined to be reasonably susceptible of being selected for award. Discussions occur when oral or written communications between Region 14 ESC and respondents are conducted for the purpose clarifications involving information essential for determining the acceptability of a proposal or that provides respondent an opportunity to revise or modify its proposal. Region 14 ESC will not assist respondent bring its proposal up to the level of other proposals through discussions. Region 14 ESC will not indicate to respondent a cost or price that it must meet to neither obtain further consideration nor will it provide any information about other respondents' proposals or prices.

• Multiple Awards
  ➢ Multiple Contracts may be awarded as a result of the solicitation. Multiple Awards will ensure that any ensuing contracts fulfill current and future requirements of the diverse and large number of participating public agencies.

• Past Performance
  ➢ Past performance is relevant information regarding a vendor's actions under previously awarded contracts; including the administrative aspects of performance; the vendor's history of reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the vendor's businesslike concern for the interests of the customer.
Evaluation Criteria

- **Pricing (40 points)**
  - Electronic Price Lists
    - Products, Services, Warranties, etc. price list
    - Prices listed will be used to establish both the extent of a vendor's product lines, services, warranties, etc. available from a particular bidder and the pricing per item.

- **Ability to Provide and Perform the Required Services for the Contract (25 points)**
  - Product Delivery within participating entities specified parameters
  - Number of line items delivered complete within the normal delivery time as a percentage of line items ordered.
  - Vendor's ability to perform towards above requirements and desired specifications.
  - Past Cooperative Program Performance
  - Quantity of line items available that are commonly purchased by the entity.
  - Quality of line items available compared to normal participating entity standards.

- **References (15 points)**
  - A minimum of ten (10) customer references for product and/or services of similar scope dating within past 3 years

- **Technology for Supporting the Program (10 points)**
  - Electronic on-line catalog, order entry use by and suitability for the entity's needs
  - Quality of vendor's on-line resources for NCPA members.
  - Specifications and features offered by respondent's products and/or services

- **Value Added Services Description, Products and/or Services (10 points)**
  - Marketing and Training
  - Minority and Women Business Enterprise (MWBE) and (HUB) Participation
  - Customer Service
Signature Form

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: 120 days

Company name  MCCI, LLC.
Address  1958A Commonwealth Lane
City/State/Zip  Tallahassee, FL 32303
Telephone No.  (850) 701-0725
Fax No.  (850) 564-7496
Email address  dwb@mccinnovations.com
Printed name  Donny Barstow
Position with company  President
Authorized signature  

Tab 2 - NCPA Administration Agreement

This Administration Agreement is made as of ____________, 2018, by and between National Cooperative Purchasing Alliance ("NCPA") and MCCi, LLC ("Vendor").

Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated ____________, referred as Contract Number 11-26, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the "Master Agreement"), for the purchase of Documents and Records Management;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as "public agency" or collectively, "public agencies") may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA;

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

General Terms and Conditions

- The Master Agreement, attached hereto as Tab 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Agreement except as expressly changed or modified by this Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Agreement including, but not limited to, the Vendor’s obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.
- Vendor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Vendor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Public Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Vendor, Region 14 ESC, or such Public Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region
14 ESC, any Public Agency or any employee of Region 14 ESC or Public Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Public Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Public Agency, or any employee of Region 14 ESC or Public Agency under this Agreement or the Master Agreement.

The Public Agency participating in the NCPA contract and Vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the Public Agency and Vendor. NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.

Term of Agreement

This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

Fees and Reporting

The awarded vendor shall electronically provide NCPA with a detailed monthly or quarterly report showing the dollar volume of all sales under the contract for the previous month or quarter. Reports shall be sent via e-mail to NCPA offices at reporting@ncpa.us. Reports are due on the fifteenth (15th) day after the close of the previous month or quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

<table>
<thead>
<tr>
<th>Entity Name</th>
<th>Zip Code</th>
<th>State</th>
<th>PO or Job #</th>
<th>Sale Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee based upon the tiered fee schedule below. Vendor’s annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.

<table>
<thead>
<tr>
<th>Annual Sales Through Contract</th>
<th>Administrative Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - $30,000,000</td>
<td>2%</td>
</tr>
<tr>
<td>$30,000,001 - $50,000,000</td>
<td>1.5%</td>
</tr>
<tr>
<td>$50,000,001+</td>
<td>1%</td>
</tr>
</tbody>
</table>
Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPC and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPC receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPC. In the event such audit reveals an underreporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPC the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPC’s costs and expenses for such audit.

General Provisions:
- This Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Agreement which is not contained herein shall be valid or binding.
- Awarded vendor agrees to allow NCPC to use their name and logo within website, marketing materials and advertisement. Any use of NCPC name and logo or any form of publicity regarding this contract by awarded vendor must have prior approval from NCPC.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney’s fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Agreement nor any rights or obligations hereunder shall be assignable by Vendor without prior written consent of NCPC. Any assignment without such consent will be void.
- This Agreement and NCPC’s rights and obligations hereunder may be assigned at NCPC’s sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPC’s obligations hereunder.
- All written communications given hereunder shall be delivered to the addresses as set forth below.

National Cooperative Purchasing Alliance:
Name: Matthew Mackel
Title: Director, Business Development
Address: PO Box 701273
          Houston, TX  77270
Signature: [Signature]
Date: April 2, 2018

Vendor: MCCI, LLC.
Name: Donny Barstow
Title: President
Address: 1958A Commonwealth Lane
          Tallahassee, FL 32303
Signature: [Signature]
Date: 3/15/2018
Tab 3 - Vendor Questionnaire

Please provide responses to the following questions that address your company's operations, organization, structure, and processes for providing products and services.

- States Covered
  - Bidder must indicate any and all states where products and services can be offered.
  - Please indicate the price co-efficient for each state if it varies.

**50 States & District of Columbia** (Selecting this box is equal to checking all boxes below)

- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- Florida
- Georgia
- Hawaii
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virginia
- Washington
- West Virginia
- Wisconsin
- Wyoming
§ All US Territories and Outlying Areas (Selecting this box is equal to checking all boxes below)

☐ American Samoa
☐ Northern Mariana Islands
☐ Federated States of Micronesia
☐ Puerto Rico
☐ Guam
☐ U.S. Virgin Islands
☐ Midway Islands

★ Minority and Women Business Enterprise (MWBE) and (HUB) Participation

• It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an M/WBE or HUB certified.
  • Minority / Women Business Enterprise
    • Respondent Certifies that this firm is a M/WBE ☐
  • Historically Underutilized Business
    • Respondent Certifies that this firm is a HUB ☐

★ Residency

• Responding Company’s principal place of business is in the city of __________ State of __________ FL.

★ Felony Conviction Notice

• Please Check Applicable Box;
  ☐ A publicly held corporation; therefore, this reporting requirement is not applicable.
  ☑ Is not owned or operated by anyone who has been convicted of a felony.
  ☐ Is owned or operated by the following individual(s) who has/have been convicted of a felony
  • If the 3rd box is checked, a detailed explanation of the names and convictions must be attached.

★ Distribution Channel

• Which best describes your company’s position in the distribution channel:
  ☑ Manufacturer Direct
  ☐ Certified education/government reseller
  ☐ Authorized Distributor
  ☐ Manufacturer marketing through reseller
  ☐ Value-added reseller
  ☐ Other: __________________________

★ Processing Information

• Provide company contact information for the following:
  • Sales Reports / Accounts Payable
    Contact Person: Lindsey Thomas
    Title: Controller
    Company: MCCi, LLC.
    Address: PO Box 2235
    City: Tallahassee State: FL Zip: 32316
    Phone: (850)701-0725 Email: finance@mccinnovations.com
• Purchase Orders
  Contact Person: Same as above
  Title: 
  Company: 
  Address: 
  City: State: Zip: 
  Phone: Email: 

• Sales and Marketing
  Contact Person: Bonnie Hutchinson
  Title: Marketing Director
  Company: MCCi, LLC.
  Address: PO Box 2235
  City: Tallahassee State: FL Zip: 32316
  Phone: (850) 701-0725 Email: info@mccinnovations.com

♦ Pricing Information
  ➢ In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing.
  ➢ If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.
    ☑ Yes ☐ No
  ➢ Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.
    ☑ Yes ☐ No
  ➢ Vendor will provide additional discounts for purchase of a guaranteed quantity.
    ☑ Yes ☐ No
Tab 4- Vendor Profile

Company's official registered name
MCCi, LLC.

Brief history of your company, including the year it was established.
Company History
MCCi, has been providing Enterprise Content Management Solutions to its clients since 1998. In 1998, Municipal Code Corporation (MCC) created a document imaging division, which subsequently evolved into MCCi in the summer of 2003. This allowed MCCi to provide its customers with a higher level of service, but still benefit from the stability and credibility of MCC. With a client base of over 740 Laserfiche clients and satellite offices across the country, we are striving to be the leading Enterprise Content Management provider in the United States. MCCi has been the #1 Laserfiche VAR in the world the last 10 years and is a Laserfiche Platinum VAR.

Company's Dun and Bradstreet number.
557446916

Company's organizational chart of those individuals that would be involved in the contract.

MCCi brings a dedicated staff of employees focused specifically on providing our clients with the most reliable solutions available. MCCi currently employs a total of 73 employees. The following are key personnel that would be associated with the project and their qualifications.

**Donny Barstow, President & CEO**
Donny is President of the company and has been with MCCi since 2000.

- **Key Responsibilities**
  - Upper-Level Decision Making
  - Enterprise Level Client Consultation
  - Research & Product Development
  - Educational Speaker

- **Experience & Skills**
  - 13 years of experience in working with government agencies
  - 11 years of experience in upper-level management

- **Education/Certifications**
  - Bachelor of Science in Management Information Systems from Florida State University
  - Master of Business Administration from University of Florida

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Traci Small, *Vice President of Sales*

Traci is Vice President of Sales and has been with MCCi since 2017.

- **Key Responsibilities**
  - Upper-Level Decision Making
  - Enterprise Level Client Consultation
  - Sales Management & Education
  - Align Market Strategy & Client Needs

- **Experience & Skills**
  - 25+ years of experience in technology sales
  - 25+ years of experience with the public sector & private industries
  - 5 years in global sales training & operations

- **Education/Certifications**
  - Bachelor of Science in Psychology from Florida State University

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Victor D’Aurio, *Chief Operating Officer*

Victor is Vice President of Operations and has been with MCCi since 2015.

- **Key Responsibilities**
  - Day-to-day operational Management
  - Strategic Planning
  - Overall Productivity and Efficiency

- **Experience & Skills**
  - 10+ years in upper-level management
  - 10+ years managing large teams and projects
  - 10+ years of experience working with government agencies

- **Education/Certifications**
  - Bachelor of Science in Management & Marketing from Florida State University

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Gareth Cales, *Vice President of Technology Innovation*

Gareth Cales has been with MCCi since 2011 and currently serves as the Vice President of Technology Innovation. Gareth specializes in enterprise system architecture, implementation and training.

- **Key Responsibilities**
  - Manages project workload and pre-sales efforts
  - Assists in Securing Business for MCCi
  - Manages Quality and Quantity of Professional Services that MCCi Delivers Throughout the Year
  - Enterprise Deployments
  - Software Installation & Training
  - Line-of-Business Application Integration
  - Business Process Analysis

- **Experience & Skills**
  - 12 years of experience in Information Technology fields
  - 4 years of experience in Technical Support
  - 6 years of experience managing projects

- **Education/Certifications**
  - CompTIA Certified Document Imaging Architect (CDIA+) Certified
Alexis Blue, Business Development Leader
Alexis has been with MCCi since 2005 and currently serves as Sales Director
- Key Responsibilities
  - Enterprise-Level Client Consultation
  - Conducting Product Demonstrations via the Web
  - Managing Existing Customer Accounts
  - Performing Mass Webinars for Current Accounts
- Experience & Skills
  - 7 years of Enterprise Content Management and Records Management practices experience
  - Over 7 years of experience in working with municipal governments
- Education / Certifications:
  - Bachelor of Science in Management and Multinational Business from Florida State University
  - Certified Document Imaging Architect (CDIA+) Certification

Christie Davis, HR & Admin Director
Christie has been with MCCi since 1999 and currently serves as the HR & Admin Director for the company.
- Key Responsibilities
  - Employee Onboarding
  - Improve Operational Systems, Processes and Policies
  - Assist in Annual Budget and Planning Processes
  - Oversee Financial and Billing Processes
  - Promote a Positive Work Environment
- Experience & Skills
  - 14 years of experience in working with municipal governments
  - 9 years of experience in management
- Education / Certifications:
  - Bachelor of Science in Human Sciences from Florida State University

Derick Proulx, IT Manager
Derick has been with MCCi since 2011 and currently leads the following departments: Support, Managed Services, and internal IT. Derick is responsible for ensuring timely and quality responses for all MCCi clients.
- Key Responsibilities
  - Manages Internal Systems (including CRM and Laserfiche, among others)
  - Primary Contact that Works with Municode’s IT Department on matters related to MCCi’s Hardware Infrastructure
  - Providing Leadership for the Support Technicians and Managed Services Technicians and Acting as MCCi Escalation Resource for All Client Support Issues
  - Monitor the Volume of Support Calls and Verify that Clients are Receiving the Highest Level of Customer Service
- Experience & Skills
  - Over 15 years of desktop and application support
  - Over 10 years of Document Management Experience
  - Responsive customer support and communication
- Education/Certifications
  - Associate of Science in Computer Networking & End User Support
  - Certified Document Imaging Architect (CDIA+) Certification
  - HIPAA Privacy & Security Awareness
  - CJIS Security & Awareness
  - Laserfiche Gold Certification
  - Certified Laserfiche Administrator I, Laserfiche Troubleshooting Specialist, & Capture II: Quick Fields Certification
Michael Widner, **Lead Solution Developer**
Michael has been with MCCi since 2004 and currently serves as the Lead Solution Developer for the company.

- **Key Responsibilities**
  - Product Development
  - Software Development & Customizations
  - Software Installation & Training
  - Project Management
  - Data Conversion
  - Customer Technical Support
- **Experience & Skills**
  - 14 years in the information technology field and technical support roles
  - 6 years in Project Management
  - 9 years of experience in software development
- **Education/Certifications**
  - Bachelor of Science in Computer Information Science from University of West Florida
  - Certified Laserfiche Integrator

Justin Atwell, **Director of Professional Services**
Justin has been with MCCi since 2015 and currently serves as a Project Manager and Installation and Training Technician.

- **Key Responsibilities**
  - Project Management
  - Software Installation and Training
  - Technical Support
  - Business Process Analysis and Design
- **Experience & Skills**
  - 3 years of experience in software project implementation
  - 2 years of experience in Project Management
  - Less than 1 year of experience with Laserfiche software
- **Education/Certifications**
  - Bachelor of Science in Marketing from University of Indianapolis
  - Certified Laserfiche Administrator I, Laserfiche Specialist, Repository Architect, Capture I, Capture II

Rigo Ruiz, **Senior Project Manager**
Rigo has been with MCCi since 2006 and currently serves as a Project Manager and Installation and Training Technician. He is based in Edinburg, Texas.

- **Key Responsibilities**
  - Project Management
  - Software Installation & Training
  - Technical Support
- **Experience & Skills**
  - 16 years of experience in customer support
  - 10 years of experience with Laserfiche software
  - 10 years of experience in working with municipal governments
- **Education/Certifications**
  - Bachelor of Science in Mathematics from the University of Texas Pan American
  - HIPAA Certified
  - CJIS Certified
  - Certified Laserfiche Administrator

Bryant Biorn, **Project Manager**
Bryant has been with MCCi since 2014 and currently serves as a Project Manager and Installation and Training Technician. He is based in Idaho Falls, Idaho.

- **Key Responsibilities**
  - Project Management
  - Software Installation & Training
  - Technical Support
• Experience & Skills
  24 years of experience in Customer Support
  14 years of experience with Laserfiche software
  14 years of experience in Working with Municipal Governments

Janice Hall, Project Manager
Janice has been with MCCi since 2014 and currently serves as a Project Manager and Installation and Training Technician. She is based in Corinth, Texas.
• Key Responsibilities
  Project Management
  Software Installation and Training
  Technical Support
  Business Process Analysis and Design
• Experience & Skills
  12 years of experience in software project implementation
  8 years of experience with Laserfiche software
  27 years of experience in working in municipal governments
• Education/Certifications
  Bachelor of Science in Microbiology from Texas A&M University
  Laserfiche CPP Gold Certified (Administration, Capture and Business Process Management)

Amanda Sommers, Project Manager
Amanda has been with MCCi since 2014 and currently serves as a Project Manager and Installation and Training Technician. She is based in Winamac, Indiana.
• Key Responsibilities
  Project Management
  Software Installation & Training
  Technical Support
• Experience & Skills
  7 years of experience in customer support
  3 years of experience with Laserfiche software
  3 years of experience in working with municipal governments
  2 years of experience working in the commercial division
• Education/Certifications
  Bachelor of Science in Management from Purdue University
  Certified Laserfiche Administrator

Blake Smith, Project Manager
Blake Smith has been with MCCi since 2016 and currently serves as a Project Manager.
• Key Responsibilities
  System Architecture & Design
  Software Installation & Training
• Experience & Skills
  15 years of experience in Information Technology fields
  11 years of experience with the Laserfiche product suite
  10 years of experience in Technical Support
  5 years of experience managing projects
• Education/Certifications
  Associate of Applied Science Degree with a concentration in Web Development
  AIIM Enterprise Content Management Practitioner Certified (ECMp)
  Laserfiche Gold Certified

Michael Lunn, Project Manager
Michael Lunn has been with MCCi since 2016 and currently serves as a Project Manager.
• Key Responsibilities
  System Architecture & Design
  Software Installation & Training
• Experience & Skills
12 years of experience in Information Technology fields
12 years of experience in Technical Support and Project Management
• Education/Certifications
  Certified CJIS Security and Awareness
  Laserfiche Gold Certified

Russell Haddock, TRMC, *Territory Leader*
Russell has been with MCCi since 2005 and currently serves as Territory Leader for the Southwest, including the Texas, Oklahoma, Missouri, Louisiana, Colorado, Kansas, and New Mexico.

• Key Responsibilities
  Managing Account Executives under Assigned Territory
  Pre-Client Consultation
  Conducting Product Demonstrations
  Attending Industry Trade Shows
  Managing Existing Customer Accounts
• Experience & Skills
  12 Years of experience with Enterprise Content Management and Records Management practices
  12 years of experience in working with municipal governments
• Education/Certifications
  Bachelor of Arts in Telecommunications from Baylor University
  Texas Registered Municipal Clerk

Logan Di Liello, *Territory Leader*
Logan has been with MCCi since 2007 and serves as the Territory Leader for Florida.

• Key Responsibilities
  Pre-Client Consultation
  Conducting Product Demonstrations
  Managing Existing Customer Accounts
• Experience and Skills
  4 years of business management experience
  5 years of experience in Enterprise Content Management and Records Management practices
  10 years of customer service experience
• Education/Certifications
  Bachelor of Science in Sport Management from Florida State University
  Master of Sport Administration from Florida State University
  Certified Document Imaging Architect (CDIA+) Certification
  Certified Laserfiche Specialist

Jessica Mathes, *Account Executive*
Jessica Mathes has been with MCCi since 2016 and currently services as the Account Executive for the Commercial Sector.

• Key Responsibilities:
  New business development and strategic sales growth within the convenience store and wholesale petroleum verticals
  Provide targeted solutions to help customers reduce operating costs by leveraging technology that automates their business processes
• Experience & Skills
  5 years Marketing & Business Development
  2 years Outside Sales
  Graphic Design
• Education/Certifications
  BA in Communication from Purdue University, Minor in Animal Science
  Laserfiche Gold Certified Professional

Phillip Miller, *Account Executive*
Phillip currently serves as Account Executive for the West - the states of Washington, Oregon, California, Idaho, Montana, Wyoming, Colorado, Nevada, Utah, Alaska and Hawaii.

- **Key Responsibilities:**
  - Client Consultations
  - Product Demonstrations
  - Attending industry events and trade shows

- **Phillip has helped match clients with the right technology solutions for over 12 years:**
  - Government and Private Sector
  - Records Management Departments
  - Real Estate Management Firms
  - Accounting Teams for Commercial and Non-Profits

- **Education/Certifications:**
  - MBA from Western Governor’s University

**Mike Beaudreau, Account Executive**

Mike has been with MCCi since 2015 and serves as the Account Executive for the Southeast (except Florida) and Northeast Regions.

- **Key Responsibilities**
  - Pre-Client Consultation
  - Conducting Product Demonstrations
  - Managing Existing Customer Accounts

- **Experience and Skills**
  - 8 years of elected public service in local government
  - 16 years of experience in Office Equipment, Enterprise Content Management and Records Management practices
  - 18 years of customer service experience

- **Education/Certifications**
  - Bachelor of Arts in Political Science and Business Administration from Clemson University
  - Additional Course studies completed at Georgetown University
  - Certified Document Imaging Architect (CDIA+) Certification

**Evan Gold, Account Executive**

Evan Gold has been with MCCi since 2016 and serves as the Account Executive for the Midwest Region.

- **Key Responsibilities**
  - Provide Proactive Support
  - Pre-Client Consultation
  - Conducting Product Demonstrations via the Web
  - Managing Existing Customer Accounts
  - Performing Mass Webinars for Current Accounts

- **Experience & Skills**
  - 5 years of experience in B2B sales
  - 5 years of experience in territory management

- **Education/Certifications**
  - Bachelor of Science in Sport Management from Ohio University
  - Minor in Business Administration
  - Laserfiche Gold Certified

**Cassie Shores, Director of Account Management**

Cassie Shores has been the MCCi Director of Account Management since 2016.

- **Key Responsibilities:**
  - Manage account management team to ensure all client needs are met
  - Provide Proactive Support
  - Pre-Client Consultation
  - Conducting Product Demonstrations via the Web
  - Managing Existing Customer Accounts
  - Performing Mass Webinars for Current Accounts

- **Experience & Skills**
5 years of experience in B2B software sales
5 years of experience in territory management

- Education/Certifications
  Bachelor of Arts in Communication from Florida State University
  Minor in Business Administration

Bonnie Hutchinson, *Marketing Director*
Bonnie has been with MCCi since 2013.
- Key Responsibilities
  - Identifies and implements marketing campaigns
  - Coordinates onsite and online events for prospective and current clients
  - Manages communication of newsletters, social media and website content
- Experience & Skills
  - 10 years of communications, marketing and public relations for small business and non-profit
- Education/Certifications
  - Certified Event Consultant

David Letson, *Training Director*
David has been with MCCi since 2011 and currently serves as Training Director; David is based in MCCi’s home office in Tallahassee, FL.
- Key Responsibilities
  - Managing Training Department
  - Onsite Training
  - Online Training Center
- Experience & Skills
  - 17 years of IT experience
  - 15 years of experience with Software Training
  - 12 years of experience in Project Management
- Education/Certifications
  - Bachelor of Science in Business Administration from Mississippi State University
  - HIPAA Certified
  - Laserfiche Certified Professional

Corporate office location- number of sales and services offices for states being bid in solicitation. List the names of key contacts at each with title, address, phone and email address.

**MCCI Home Office- Tallahassee, FL**
Donny Barstow, President & CEO
Victor D’Aurio, COO
Traci Small, VP of Sales
Christie Davis, HR & Admin Director
Justin Atwell, Director of Professional Services
Derick Prolux, IT Manager
Michael Widner, Lead Solution Developer
Logan Di Liello, Account Territory Leader
Cassie Shores, Director of Account Management
Bonnie Hutchinson, Director of Marketing
David Letson, Training Director
Michael Lunn, Project Manager

**Jacksonville, FL Offices**
Gareth Cales, VP of Technology Innovations
Alexis Blue, Business Development Leader

**Texas Offices**
Russell Haddock, Account Territory Leader
David Bible, Account Executive
Janice Hall, Project Manager
Levi Johnson, Project Manager
Rigo Ruiz, Project Manager

**Georgia Office**
Mike Beaudreau, Account Executive

**Idaho Offices**
Phillip Miller, Account Executive
Bryant Biorn, Project Manager
Annie Lloyd, Project Manager
Blake Smith, Project Manager

**Indiana Office**
Amanda Sommers, Project Manager

**Kentucky Office**
Jessica Mathes, Account Executive

**Nevada Office**
Jessica Smith, Project Manager

**Ohio Office**
Evan Gold, Account Executive

**Tennessee Office**
Bruce Avilla, Account Executive

*Please note- additional contact information will be provided upon request.*

**Define your standard terms of payment.**

MCCI utilizes a standard net 30 payment terms policy. Billing terms and milestones are based on the specific project and deliverables.

All Net New Orders:
MCCI will invoice one hundred percent (100%) of the software and support upon delivery of software. If services are included, the balance of the total project will be invoiced upon completion of the proposed professional services, which may be broken up based on the completion date of specific services. Sales tax will be included where applicable. Payment will be due upon receipt of an invoice.

Laserfiche software and help files are provided electronically. Hard copy manuals or software are available upon request, for a $50 additional charge.

To ensure you are budgeting correctly for future renewals, please add the amount listed in the budgetary note above to your current budgeted renewal amount.

All Add On Orders:
MCCI will invoice one hundred percent (100%) of the software and support upon delivery of software. If services are included, the balance of the total project will be invoiced upon completion of the proposed professional services, which may be broken up based on the completion date of specific services. Sales tax will be included where applicable. Payment will be due upon receipt of an invoice.

Laserfiche software and help files are provided electronically. Hard copy manuals or software are available upon request, for a $50 additional charge.
Note: MCCi will prorate the support of this additional software to be congruent with your current Laserfiche system’s annual support (LSAP) dates, the purpose of which is to align all software with one support date so maintenance of your account is simple. MCCi will bill for the actual amount of support, which may be higher or lower than quoted. To ensure you are budgeting correctly for future renewals, please add the amount listed in the budgetary note above to your current budgeted renewal amount.

All Scanning Orders:
MCCi will invoice project on a monthly schedule, based on deliverables (via Electronic media or the internet). Payment is due upon receipt of an invoice.

All JustFOIA Orders:
MCCi will invoice one hundred percent (100%) of the subscription amount upon providing the Client online access to the JustFOIA service. Balance of total project will be invoiced upon completion of the proposed professional services. Sales tax will be included where applicable. Payment will be due upon receipt of an invoice. Client’s annual subscription renewal date is set based on thirty days after contract is received.

Who is your competition in the marketplace?
MCCI is focused on providing Enterprise solutions to help government agencies go paperless. We do run into competition that handles similar solutions, however most are lacking the government experience we provide. Our competition includes:
• Other Document Management companies
• Customized Agenda Management solutions

What differentiates your company from competitors?
MCCI is focused on providing a complete solution for clients to help them with their Document & Records Management needs. MCCi has many differentiators including:
• Largest Laserfiche Provider – MCCi, a subsidiary of Municipal Code Corporation (The nation’s leading codifier for local government), has been providing Electronic
Records Management Solutions to its clients since 1998. For the past ten years, MCCi was ranked as the #1 Laserfiche VAR in the United States.

- **Government Focus** - MCCi was created by Municipal Code Corporation to focus on innovative technologies for Government. MCCi provides Document & Records Management services to more than 500 government entities including Cities, Counties, State Agencies, Special Districts, Schools, Higher Education, and more.

- **Professional Certifications** - MCCi’s staff is well-trained and holds multiple certifications in security, HIPPA, CDIA+ and more to give you the peace of mind that we are simply the best at what we do. Our staff is also Laserfiche Gold Certified, meaning we have passed the Laserfiche CPP courses required for this certification.

- **Specialization in Enterprise Solutions** - Our Project Managers provide implementation and training services to help make your solution an Enterprise-wide deployment. We work with you on your initial project plan knowing that one day Laserfiche will be used across the entire organization. This methodology helps you plan to meet this goal in your time frame whether it be an immediate objective or part of a multi-year plan.

- **Dedicated Project Management** - Our Project Managers are highly trained in the areas of implementation, Workflow processes, integrations, and more to help your organization implement a well thought out Enterprise system based on your organization’s needs. They are Laserfiche gold certified and also hold other professional certifications to maintain a high knowledge level of our client’s business processes.

- **Dedicated Support** - Once your project is complete, you will have access to our support staff for trouble shooting & supporting your Laserfiche system. Our staff can be easily reached through email, phone or our online support center.

- **Training Services** - Before, during, and after your project, we focus on ensuring the users are trained on the software and stay up to date on the features available. In addition to our Training Services, we offer a yearly subscription to our Online Training Center for Laserfiche to help protect your Laserfiche investment. This allows all types of users, regardless of their role, to access videos on popular topics. This information is updated monthly and will be a continued resource for your organization.

- **Back File Scanning & Conversion Experience** - in the event you need to address a back-file scanning project or have older data from legacy systems to convert, we have experience in addressing these and integrating them into your Laserfiche system. We have converted over 30 different applications and migrated the data to Laserfiche for other clients.

**Describe how your company will market this contract if awarded.**

MCCI has a marketing department at our home office that is already dedicated to executing a marketing plan for MCCi products and services. We will take those current strategies and tactics and apply them to NCPA members. We have a marketing budget allotted, over $500,000.

A brief description of our marketing plan is described below:

**Vertical Focus**

In addition to our government focus, we believe focusing on specific verticals within this will allow us to leverage client successes and allow for an increased number of sales versus just focusing on government in general. We define our verticals based on areas we have a current client that has a story to share. The current verticals we focus on are:

- Cities & Counties
- State Agencies
Events
MCCI sees our most success from our events. We strive to make the most of each event to maximize the leads earned from each.

Association Conferences
We maximize our conferences by attending all events, providing informational marketing materials at our booth and securing speaking engagements to allow us to educate the market on our products and services. We attend over 120 conferences a year. These include municipal clerks, CIO/IT Directors, school business officials, HR, user groups, and more. For example, in the state of Texas, we are focused on attending the following conferences:
- Texas Municipal Clerks Association (TMCA)
- Texas Association of Government Information Technology Management (TAGITM)
- IIMC (National conference of clerks, but has a high presence from the state of Texas)
- Texas Municipal HR Association
- Texas Municipal League (TML)
- Texas Association of School Business Officials
- College and University Professional Association for Human Resources (CUPA-HR)

Events
MCCI holds multiple events a year including: User Communities, workshops, webinars and more. These are a way clients and prospects to come together to network and learn more about Laserfiche. These educational events facilitate sales as clients learn about new products and new ways they can use the software. We have found these to be very successful in retaining our clients and our sales efforts.

Website
We currently maintain a website to draw potential clients and support current clients. We post our events to this site and focus on strengthening our SEO by using Google AdWords and keeping our content fresh and new. We also post all current news from our company and any published case studies on our site. Our site can be reviewed at www.mccinnovations.com

Case Studies & Press Releases
We work with our clients to document their success in the form of case studies and press releases. We use these on our website, at conferences, and through email marketing to continue to spread the word about our products and services. Describe how you intend to introduce NCPA to your company.

If MCCI is chosen as a vendor, we will focus on educating our staff on the contract in order to make sure we maximize the use of it in our sales process. This will become a resource for us to educate prospective clients on as they approach the buying phase in the sales process. We will:
- Conduct an educational session for our staff
- Create documentation that can be easily forwarded along to prospective clients that includes all the pertinent information, so they can easily utilize the contract
- Educate prospective clients on the process
- Include NCPA staff as we can to help educate our team
Describe your firm's capabilities and functionality of your online catalog/ordering website.

MCCi currently has a website that provides information on our products and services as well as contact information to help ensure prospective clients can get in touch with us easily. In addition to our website, we will create a landing page that includes all pertinent information and discounts for easy viewing similar to how other vendors have their information provided with NCPA now. Due to the complexity of our solutions, we cannot offer “online ordering” but we can list our products, services, discounts, and contact information to help prospective buyers easily navigate to the pertinent information and contact us for further information.

Describe your company's Customer Service Department (hours of operation, number of service centers, etc.)

MCCi Technical support hours are Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Green Initiatives

MCCi is very unique in the green initiative we have adopted - we are totally paperless, in every sense of the word. A filing cabinet, a memo board, or even offices piled high with paper do not exist within our company. Not only are we paperless, we are helping other organizations across the country become paperless by implementing electronic records/document management systems enterprise wide since 1998. By focusing our entire business plan around creating paperless environments country wide, we are helping to reduce the extreme stress our environment has endured to produce paper century after century. Since 1998, we have helped over 500 organizations enter into a paperless environment. Each year, the world produces more than 300 million tons of paper. Two to four tons of trees are required for each ton of paper produced. This along with the process for making paper has made this industry one of the largest contributors to greenhouse gas emissions and accounts for about 25% of all landfill waste. The average office worker uses over 10,000 sheets of printing and copying paper per year. If each office could cut their paper use by just 10%, it would help prevent the emission of 1.6 million tons of greenhouse gases. That is equivalent to taking 280,000 cars off the road! By becoming a paperless office and implementing paperless solutions in organizations across the country, MCCi is playing a major role in reducing the negative greenhouse affects paper has imposed on our planet. The entire company culture has shifted noticeably towards an increased environmental sensitivity. Unlike many companies and agencies, there are no file cabinets in MCCi's offices - there are no cluttered desks buried under mountains of paperwork. If printing is necessary, then the entire company shares one single printer, inconveniently located down the end of a dimly lit hallway. All visitors to MCCi facilities immediately comment on the absence of clutter, and a general cheerfulness abounds. Now, our customers send us their mission-critical documents so that we can scan in and convert them to digital images making them fully searchable online. The MCCi culture is rubbing off on the very people we do business with each day.

Vendor Certifications

Our growth and our client's success is widely recognized. Most recently, Inc. Magazine recognized MCCi as an Inc. 5000 fastest-growing private companies in the United States. Additional noteworthy recognition includes Top 10 Best Companies to Work, Tallahassee Chamber Technology Business of the Year, Florida Companies to Watch, and Gator100.

Laserfiche has the following industry awards/recognition:

Gartner

Gartner

Laserfiche was recently named a Challenger in the Gartner Magic Quadrant for Content Services Platforms1. As one of 19 vendors evaluated, Laserfiche moved into the Challengers
quadrant this year and was recognized based on its completeness of vision and ability to execute.

Nucleus

Laserfiche has been named a leader in the Nucleus Research ECM Technology Value Matrix 2017 for its functionality, innovation and range of capabilities in response to user needs. The Value Matrix draws from customer feedback, product demonstrations and conversations with vendors and users.

“Laserfiche is one of very few ECM vendors with strong, organic annual revenue growth without mergers or acquisitions,” wrote Barbara Peck, Principal Analyst for Nucleus Research, in the report, citing Laserfiche’s annual customer retention rate of nearly 96 percent. "The solution’s high rate of usability is due in part to a common code base, relatively simple customization, field auto-population, rapid deployment, and a robust mobile application, among other factors.”.

Info-Tech

Laserfiche been positioned as a leader in Info-Tech Research Group’s Enterprise Content Management (ECM) Vendor Landscape. “Laserfiche has deep roots in the ECM market and continues to be a market leader,” said the report.

All reports can be downloaded at Laserfiche.com

Other Recent Awards

2017
CRN- 5-Star Partner Program Winner

2015
Winning Workplaces – Best Technology Company

2013
Stevie Awards Best New Business Product- Laserfiche 9
Best in Biz Awards- Best New Enterprise Product of the Year – Silver
Stevie Awards- Company of the Year
CRN- 5-Star Partner Program Winner
Pearl Awards- Best Blog

2010
Business Solutions Awards- Best Channel Vendor - ECM & Data Capture Software

MCCI Awards:
Inc 5000 Fastest Growing Companies in the US
Best Companies to Work – 3 consecutive years
Seminole100 Fastest Growing Companies owned by FSU Alumni
Gator100 Fastest Growing Companies owned by UF Alumni
Microsoft Gold Partner
2014 Florida Companies to Watch
2015 Laserfiche Platinum VAR

MCCI can conduct business in all states. Please see our letter from Laserfiche regarding our ability to conduct business nationwide. Any additional documentation can be provided upon request.

- Laserfiche Gold Certified reseller
- Microsoft Gold Certification
- Laserfiche Gold Reseller
- Laserfiche Winner Circle VAR the last 10 years
- Top Laserfiche reseller the last 8 years
LASERFICHE DEFINITIONS

LASERFICHE WORKFLOW
Automates business processes, such as approvals, routing based on conditions, or database integrations, improving consistency with how records are filed in Laserfiche.

LASERFICHE SNAPSHOT
Print directly into Laserfiche, capturing a “snapshot” of the electronic file at the time. These files are saved in TIFF format, an unalterable image.

LASERFICHE EMAIL PLUG-IN
Allows instant electronic document distribution via standard MAPI-compliant e-mail applications. This feature is included in every Full User and Retrieval User license.

LASERFICHE WEB ACCESS
A web-based thin client, offering virtually all document management capabilities of the standard Laserfiche interface. Web Access allows your IT staff to roll out high-volume Laserfiche access and version updates without increasing your organization’s application support burden. Web Access also includes access to Laserfiche Mobile and the Laserfiche SharePoint Integration resources.

LASERFICHE SHAREPOINT INTEGRATION
The SharePoint Integration (SPI) is built on the power of Laserfiche Web Access, a Section 508-compliant thin client that reduces installation, support, and maintenance requirements. The integration requires an on-premise installation of SharePoint.

LASERFICHE MOBILE/WEB ACCESS LIGHT
Let’s organizations access the features of the Laserfiche Client through a smartphone or tablet. They can remotely capture, edit, and search for documents, interact with Laserfiche Forms and start/participate in a business process. Mobile is available for iOS, Windows, and Android devices. Laserfiche Web Access or Laserfiche Forms is required for any/all mobile access options.

LASERFICHE DIGITAL SIGNATURES
A way of indicating that a document signature is authentic and has not been modified since the signature was applied. Allows users to automatically sign and validate documents directly in the Laserfiche Client or Laserfiche Web Access.

LASERFICHE AUDIT TRAIL MODULES
- **Starter Edition**: Tracks basic events that occur in the repository and that involve accessing, modifying, or exporting data. Basic events include creating, editing, printing, or deleting documents, creating annotations, and assigning metadata.
- **Standard Edition**: Builds on the Starter Edition by tracking additional security/access-related events, and unsuccessful attempts to perform actions, such as failed attempts to access or print documents.
- **Advanced Edition**: All the functionality of the other two editions, and tracks more events including password changes, creation or modification of users and groups, and changes to repository-wide settings. It can also track all searches users perform, require users to
enter reasons for performing certain actions, and automatically add watermarks to printed documents.

**LASERFICHE SCANCONNECT™**
A collection of ISIS scanner drivers is included with Laserfiche ScanConnect. ScanConnect can be purchased as an add-on to both Laserfiche scanning and Quick Fields.

**LASERFICHE FORMS**
Laserfiche Forms allows organizations to create electronic fillable forms for collection and processing information. See the Laserfiche Licensing Guide for licensing options and descriptions.

Laserfiche Forms has flexible design options to meet your organization’s needs. You can:
- Create custom forms from a library of field or selection elements.
- Utilize the Business process library includes (10.1+) a digital library of prebuilt form templates designed for easier process automation deployment.
- Automate business processes for form data to follow, such as decision-making, emailing, or approvals (dynamic behaviors available with CSS and JavaScript).
- Role-based security is included to allow and restrict access to necessary functions for form submitters, reviewers, approvers, form creators, and system administrators.

Reporting tools allow different views of details on submitted forms such as:
- User view of details about all submitted forms.
- Approver “dashboard” of submissions awaiting approval.
- Administrator views of all submissions by form and approval status.
- Forms can be used internally or externally (with the appropriate licensing). Publication options include a login to forms system, public URL, secure URL, or embedded into a webpage.

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<thead>
<tr>
<th>Feature</th>
<th>Forms Essentials</th>
<th>Forms Professional</th>
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<tbody>
<tr>
<td>Business process and form creation functionality*</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Operational Dashboard</td>
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<td>X</td>
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<td>View basic reports on process instances, tasks, and process data</td>
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<td>Teams</td>
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<td>Direct Approval through Email</td>
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<td>Database Lookups</td>
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<td>Performance Dashboard</td>
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<td>Enhanced reporting with built-in data aggregation options such as count, sum, min, max, average, and median</td>
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<td>X</td>
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<tr>
<td>Create advanced reports with data visualizations including charts and graphs</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Payment Gateway (Compatible Payment Processor Account Required)</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

* Includes JavaScript/CSS, field rules, and form themes

**LASERFICHE FORMS PORTAL MODULE**
The Forms Portal license allows Form submission from unlicensed (public) users. Forms Portal is designed primarily for non-internal/public user submissions, therefore there is no Windows Authentication security validation provided. The users that access Forms through the Forms Portal can only submit forms (these users cannot participate in the business process after a form has been submitted). The Forms Portal is licensed to a specific Forms instance/server, rather than to the Laserfiche Application Server. Please note that if an organization desires to have a Forms Portal for internal users, as well as a Forms Portal for external users, and security protocol requires that these two Forms Portals reside on separate servers (one internal one external), Enterprise Forms Portal or multiple Forms Portal licenses are required.
LIMITED USE ACCESS LICENSES
Laserfiche offers limited use and more affordable licensing options for clients in need of only a subset of modules/features for a particular use case and/or group of users.

RETRIEVAL NAMED USERS
For users in need of read-only repository access. The Laserfiche email plug-in is included and access is available through the Laserfiche Client or Laserfiche Web Access.

LASERFICHE FORMS AUTHENTICATED PARTICIPANTS
For users who do not have the need/budget for a Full Named User License/Forms Professional license but do have the need for authenticated access to submit forms and participate in forms approval processes. Note: In the Avante platform, a Forms Authenticated Participant license is required for each Forms Server that the user needs to submit to, whereas with the RIO platform Laserfiche Directory Services authentication can be configured/utilized to avoid the need for additional licensing per user.

SUBSCRIPTION LASERFICHE EMPLOYEE PARTICIPANTS
For employees in need of read-only repository access and the ability to participate in forms processes.

SUBSCRIPTION LASERFICHE COMMUNITY USERS
For non-employees and non-contractors. Provides read-only repository access and ability to participate in forms processes (i.e. Vendor Management).

SUBSCRIPTION LASERFICHE EDUCATION COMMUNITY USERS
For accredited educational institutions that meet the requirements listed. Licenses are reserved for the education community including faculty, students, alumni, and parents and guardians of students. Faculty includes professors (assistant, adjunct, associated, tenured), lecturers, and researchers. Provides read-only repository access and ability to participate in forms processes.

- Educational Institutions: Defined as an accredited school organized and operated exclusively for educational purposes. An accredited school must be:
  - A public or private K-12, vocational school, correspondence school, junior college, college, university, or scientific or technical institution accredited by associations recognized by the US Department of EDU and/or the State Board of EDU.
  - A preschool meeting all of the following:
    - is an early childhood program that serves a minimum of ten children ages two through five
    - has been in operation for at least one year provides educational services.

- Administrative Offices or Boards of Education:
  - A district, regional, or state administrative offices of public Educational Institutions.
  - Administrative entities organized and operated exclusively for the administration of private Educational Institutions.
  - Other state or local government entities nearly all of whose activities consist of administrative support, of a nature that advances academic learning for public Educational Institutions.

- Administrative offices or boards of EDU of educational institutions: defined as district, regional, and state administrative offices of the foregoing educational institutions defined above.

- Full and part-time faculty and staff of educational institutions:

- Defined as all full and part-time faculty and staff of educational institutions defined above.

- Full and part-time matriculated students of higher education institutions:

- Defined as full and part-time matriculated students of a higher education institution defined as a public or private vocational school, correspondence school, junior college, college, university, or scientific or technical institution accredited by
associations recognized by the State Board of EDU and/or the U.S. Department of Education.

- Hospitals that are wholly owned and operated by an Educational Institution
- “Wholly owned and operated” means that the Educational institution is the sole owner of the said hospital and the only entity exercising control over the hospital’s day-to-day operations.

**LASERFICHE IMPORT AGENT**
Automatically retrieves files stored in a Windows folder and imports them into a Laserfiche repository, performing OCR as part of the process.

**LASERFICHE PUBLIC PORTAL - WEBLINK™**
The WebLink module publishes select documents in a Laserfiche repository to an intranet or the Internet in read-only form. Built on ASP .NET, WebLink can be customized to match the look and feel of an organization's Internet or intranet site.

**LASERFICHE RECORDS MANAGEMENT**
The Records Management module allows for managing the complete life cycle of records in Laserfiche to include retention schedule management, legal holds/record freezes, disposition and vital record management, etc.

**LASERFICHE “QUICK FIELDS” (QF) BATCH PROCESSING TOOLS**
High volume capture software that automates document import, classification, and indexing. Quick Fields transforms data capture from a costly and labor-intensive operation into an efficient process, improving the speed and accuracy of data capture. QF is a prerequisite for the following:

- **QF Real-time Look up Validation Package**: Lookup populates template fields and validates metadata by retrieving data stored in third-party databases and other applications.
- **QF Zone OCR Validation Package**: The Zone OCR (Optical Character Recognition) add-on will scan a specific zone on an image for text. The data returned by this process can be used for identifying pages, populating fields, determine document names, or determining file location.
- **QF Forms Alignment**: Automatically repositions scanned documents to match a master form, correcting for scanning errors and improving data extraction.
- **QF Document Classification**: Designed for clients who handle multiple forms and document types.
- **QF Auto Stamp/Redaction/Bates Numbering**: A document auto-numbering annotation option.
- **QF Optical Mark Recognition**: Detects handwritten information, including marks on surveys.
- **QF Agent**: Enables administrators to schedule QF processing without operator intervention.
- **QF Forms Identification**: Automatically recognizes the document based on its overall structure, even in the absence of bar codes, form data or other distinguishing information.
- **QF Forms Extractor**: Removes form outlines to isolate data for more accurate capture.
- **QF Scripting Kit**: Offers a QF script editor, allowing developers to write C# and VB.Net Scripts.

**LASERFICHE PLUS™**
Allows information stored in Laserfiche to be portable. When published by Laserfiche Plus files can be viewed by anybody, regardless of whether they have Laserfiche installed. This
software prepares a copy of the Laserfiche files (images, text, electronic files, annotations, templates, and field data) for burning directly to your removable media or to a temporary directory. Choosing to publish to a temporary directory allows you to write it to your removable media at your convenience.

**MCCI’S OCR SCHEDULER FOR LASERFICHE**
A simple, effective, and efficient way to mass OCR documents in Laserfiche. It allows administrators to configure multiple OCR sessions and ensure OCR is being completed, without end user interaction.
INTEGRATION DESCRIPTIONS

LASERFICHE CONNECTOR
Provides a streamlined experience for integrating Laserfiche with line of business applications such as CRM and ERP systems. Laserfiche Connector integrates easily through user-defined hotkeys and embedded icons. Laserfiche Connector allows you to:
- Search results will automatically open in the Laserfiche Client, Web Access, or WebLink.
- Scan and automatically populate metadata with information from a third-party application.
- Import and automatically populate metadata with information from a third-party application.
- Connect two applications by allowing one of them to start the other (including the ability to pass parameters between them).
- Choose whether any of the above actions are activated from a keyboard shortcut, a button embedded in the application's title bar, or both.

LASERFICHE INTEGRATOR'S TOOLKIT (SDK)
Provides the tools and documentation necessary for customizing Laserfiche and integrating Laserfiche with other applications.

RATCHETX INTEGRATION
A configurable and robust middleware integration tool for Laserfiche. With a single click of a button, new documents can be added to Laserfiche from another application, and users can search Laserfiche directly from the applications they use most. The robust toolset it provides for accessing data from other applications (even the toughest proprietary systems), for use configuring the most common ECM integrations: Indexing, importing/scanning, and executing search queries. In addition, RatchetX provides the capability to create custom integration activities, such as populating a record in another system from the data extracted during the intake process in Laserfiche or looking up a record in another system from the Laserfiche interface itself (Bi-directional Integration).

LASERFICHE INTEGRATOR GP
Empowers Great Plains users to scan, search and link supporting documents in Laserfiche directly from the Great Plains menu bar.

LASERFICHE INTEGRATOR AUTOCAD
Allows you to store AutoCAD drawing files or associated documents in Laserfiche, including embedded cross reference files, directly from the AutoCAD menu. Launch Laserfiche scan or search modules using the drawing file for template or search criteria or create a Laserfiche document template using the fields from any AutoCAD drawing title block with a single click.

LASERFICHE ENERGOV INTEGRATION BY MCCI
The Laserfiche EnerGov integration offloads the storage of documents from EnerGov to Laserfiche. This allows users to seamlessly store documents that would normally be saved in EnerGov, directly to their Laserfiche system. The integration makes use of the native EnerGov interface for attaching documents. The integration also allows meta-data associated with the EnerGov record to be tied to the entry in Laserfiche. Users wishing to view uploaded documents can do so through the existing EnerGov Interface. Please see "Client Deliverables" for other features available/dependent on EnerGov configuration settings. Each of the following areas are available in the integration configuration settings:

- EnerGov Application
- EnerGov Invoice
- EnerGov Business
- EnerGov Inspection Case
Platform and Licensing Requirements

The EnerGov integration can operate by using two different Laserfiche user licensing options.

- **Recommended**: Utilization of Laserfiche "Keyed Integrator’s License for EnerGov", which allows for up to 25 (higher volume packages can be purchased) concurrent connections to Laserfiche. This is the Laserfiche licensing approach recommended. Note that the Keyed Integrator’s license is only available for the Laserfiche Avante or RIO platforms.
- **Utilization of current Laserfiche licensing**:
  a. Laserfiche Avante or RIO platforms: A single named user can be used to connect to the Laserfiche server. This user is limited to four concurrent connections at a time, and is the max amount allowed with Laserfiche Avante and RIO platforms;
  b. Laserfiche Classic (Team or United) platforms: A user account can be used to connect to the Laserfiche server, however it will potentially consume all available concurrent licenses and limit the use of Laserfiche outside of the EnerGov integration. It is recommended that the client upgrade to the Avante or RIO platform, rather than take the risk of utilizing the integration and not having control of license consumption within the Laserfiche Classic (Team or United) platform.

EnerGov Compatible Platforms: The Laserfiche EnerGov Integration is compatible with EnerGov On-Premise currently. A future release is planned for the EnerGov Cloud platform.

EnerGov Licensing Requirements: EnerGov clients must confirm with EnerGov, their ownership of the needed SDK, API, and/or general EnerGov licensing requirements related to this integration.

ESRI ARCGIS INTEGRATION OPTIONS

**GEODOCS**
This is a robust GIS integration that is developed and maintained by a MCCi partner. It is a web-based software that seamlessly integrates ESRI ArcGIS Server and Laserfiche. Utilizing robust search capabilities, users of GeoDocs can access digital documents stored in a Laserfiche repository from within the web-based GIS program and vice versa, access spatial information stored in a GIS from within the Laserfiche web client.

**ARCGIS® INTEGRATION FOR LASERFICHE**
This is a basic ArcGIS (10.1 or higher) integration that is developed and maintained by a MCCi partner. It allows for easy interaction between the ArcGIS interface and a Laserfiche repository, by allowing users to upload documents to Laserfiche straight from the ArcGIS interface and view any related documents/folders via Laserfiche Weblink or Laserfiche Web Access (requires Laserfiche licensing for Laserfiche Weblink or Web Access). The dynamic ArcGIS map will auto-populate, indicating which features on the map have documents associated with them in Laserfiche.

**LT SYSTEMS LASERFICHE INTEGRATION**
LT Systems Laserfiche Integration allows users of the LT Systems Court solutions to archive court related documents into Laserfiche. Users can launch Laserfiche scan or searching...
windows from LT Systems and bring data and documents directly into Laserfiche while capturing metadata in LT Systems. Additionally, there is an automated service that archives Warrants as single documents with the associated metadata, directly from LT systems to Laserfiche.

**LASERFICHE INTEGRATION WITH DOCUSIGN**
The Laserfiche Integration with DocuSign enables users to initiate a signing process from within Laserfiche Web Access. Users may select the type of signing process they are initiating and attach documents that need to be a part of that process. Also, once the signing process completes, documents are imported back into the Laserfiche Repository from DocuSign as new versions of the un-signed document. Information captured during the signing process may be mapped to Laserfiche metadata fields.

**LASERFICHE INTEGRATION WITH SIGNIX**
Laserfiche’s integration with SIGNiX will enable Clients to sign documents online with SIGNiX directly from within the Laserfiche Client or Web Access. Users may select one or more PDFs to send in a single transaction, then documents are sent over to SIGNiX where Clients follow the user friendly SIGNiX UI to complete the signature process. When the signing process is completed or cancelled, documents are imported back into the Laserfiche Repository from SIGNiX as new versions of the unsigned document. Administrators can set up certain fields to be automatically filled when a document is signed.
Each Client’s Laserfiche Renewal covers break/fix support (i.e. resolution of error codes, etc.). MCCi offers additional annual support packages to cover remote training, best practices consultation, basic configuration services, and maintenance of existing complex business processes.

MCCi Managed Services (MS) or MCCi Laserfiche Administration Services (LAS) are strongly encouraged to be included with every support renewal.

<table>
<thead>
<tr>
<th>Description</th>
<th>MS*</th>
<th>LAS** Level 1</th>
<th>LAS** Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Training</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Additional System Set Up Consultation</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Remote Implementation of Software Updates</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Annual Review of Administration Settings</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Remote Access Support</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Priority Offering of Laserfiche CPPs &amp; Laserfiche Empower Registration Scholarships</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Dedicated Laserfiche Certified Professional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laserfiche Administration Configuration Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Configuration and maintenance of BASIC business processes utilizing Laserfiche Forms and Laserfiche Workflow</td>
<td>cabin</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Configuration of Quick Fields sessions using purchased features</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Basic Records Management Module Overview Training</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Scheduled recurring consultation call upon Client’s request</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance of existing middleware/configurable integrations</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Maintenance of MCCi/Client configured COMPLEX business processes</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Annual Review of business process configurations</td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

*Workflow Managed Services* also includes ability to consult on best practices specific to workflow; additional remote training ideal for refresher training or new personnel; workflow security consultation and more.

**A Business Process** is a Workflow, Forms process or Quick Fields session that automates or streamlines an organization-specific process.
- **Basic**: A business process requiring minimal configuration and virtually no institutional knowledge, allowing a MCCi Application Support Analyst to assist with configuration, support, and maintenance of the process. **Examples**: Filing workflows, simple Forms or approval/notification workflows that have few routing steps, no integration, and little to no database lookups.
- **Complex**: A large business process with extensive configuration that is absolutely mission critical to the organization. **Examples**: Large accounts payable process with a high volume of transactions, approval steps, database lookups, etc. Complex business processes require MCCi’s Application Support Analyst to have institutional/process knowledge to configure the process.
- **Hours**: MCCi allows clients to use their hours for a multitude of services, as long as a request will not start a service that cannot be completed. None of the packages listed above are intended to be utilized for configuration of a new COMPLEX business process. In those instances, a separate SOW is required.

**MANAGED SERVICES (MS)**
MCCi’s Managed Services package provides additional training and assistance to a Client’s Laserfiche administrator and users. Pricing for the advanced block of hours is based on MCCi’s Support Technician hourly rate discounted by 10%. The number of hours included is
based on active products and will expire on the same date as your annual renewal. Managed Services can be used for the following:

**ADDITIONAL TRAINING**
Additional web-based training is conducted to train new users or as refresher training for existing users.

**ADDITIONAL SYSTEM SET UP CONSULTATION**
MCCI offers additional best practices consultation that includes recommendations for adding additional departments, additional types of indexing, etc.

**REMOTE IMPLEMENTATION OF SOFTWARE UPDATES**
While your renewal covers free version updates for software, implementation of those updates is sometimes overlooked. With the addition of Managed Services, MCCI is at your service to directly assist with implementing software updates such as minor updates, quick fixes or point releases. Dependent on complexity and client specific configurations, major software upgrades may or may not be covered and should be discussed with your Account Management Team.

**ANNUAL SYSTEM REVIEW & ANALYSIS**
MCCI will access your system to review how your organization uses Laserfiche, to identify potential issues, and to make recommendations for better use of the system. This analysis may be performed annually and is an optional service that will be completed only if requested by the Client.

**REMOTE ACCESS SUPPORT**
If requested, our Support Technicians can access your Laserfiche system remotely to resolve issues, saving both time and money.

**LASERFICHE CERTIFICATIONS**
Priority offering of complimentary Laserfiche certifications, based on availability.

**LASERFICHE CONFERENCE REGISTRATION**
Priority offering of complimentary Laserfiche Empower registration, based on availability.

*Please see chart above for information on Workflow Managed Services.*

**CLIENT RESPONSIBILITIES FOR MS**
- Configuration/maintenance of backups and any general network, security, or operating system settings outside of Laserfiche
- Management and creation of retention policies related to Records Management Module
- Providing an IT contact (internal or third-party) for MCCI to work with as necessary
- Providing remote access capabilities as needed. If the Client requests MCCI to have unattended access, the Client assumes all responsibility for the related session(s). The Client will work with MCCI to set up user profiles, user tags, etc. to allow desired security rights/access.

**LASERFICHE ADMINISTRATION SERVICES (LAS)**
MCCI’s Laserfiche Administration Services package is for Clients who need a Laserfiche administrator, or additional Laserfiche administration services. Pricing for the advanced block of hours is based on MCCI’s Application Support Analyst hourly rate discounted by 10%. The number of hours included is based on active products and will expire on the same date as your annual renewal. Laserfiche Administration Services offers the following:

**LASERFICHE ADMINISTRATION SERVICES: LEVEL 1**
- Dedicated Laserfiche Certified Professional
- Laserfiche Administration configuration services – setting up users, metadata, security, etc.
- Configuration and maintenance of basic business processes utilizing Laserfiche Forms and Workflow
- Configuration of Quick Fields sessions using purchased features – excludes custom scripting, custom calculations, etc.
- Basic Records Management Module Overview Training
- Scheduled recurring consultation calls upon Client’s request
• Maintenance of existing middleware/configurable integrations – does not include maintenance of custom built integrations.

LASERFICHE ADMINISTRATION SERVICES: LEVEL 2
Level 2 includes the benefits of Level 1, but additionally provides the ability for MCCi to maintain complex business processes, which requires knowledge transfer and maintenance of that knowledge.

• Maintenance of MCCi/Client configured complex business processes – The Application Support Analyst can maintain MCCi or Client configured complex business processes. For example: minor tweaks, updates due to upgrades, process improvements, etc.

• Annual Review of business process configurations

CLIENT RESPONSIBILITIES FOR LEVEL 1 & LEVEL 2
• Configuration/maintenance of backups and any general network, security, or operating system settings outside of Laserfiche
• Management and creation of retention policies related to Records Management Module
• Providing an IT contact (internal or third-party) for MCCi to work with as necessary
• Create/provide process diagrams (and any other necessary paperwork/examples)
• Providing remote access capabilities as needed. If the Client requests MCCi to have unattended access, the Client assumes all responsibility for the related session(s). The Client will work with MCCi to set up user profiles, user tags, etc. to allow desired security rights/access.

THE TRAINING CENTER FOR LASERFICHE
MCCi’s Training Center for Laserfiche annual subscription provides an easy, cost-effective way for all users in your organization to access over 500 Laserfiche training videos.

BENEFITS
• 24/7 access to on-demand Laserfiche training videos and other resources
• Reduction in training expenses
• Caters to all skill levels from Basic Users to Advanced System Administrators
• Unlimited access for your entire organization
• User determined schedule and pacing
• Reduction in internal support and increased user productivity
• Increased efficiency through improved internal usage/adoption
• Instant/budgeted training available in the case of employee turnover
• Enhance your organization’s internal Laserfiche training program

*The Training Center subscription gate is based on Laserfiche full, retrieval, and WebLink/public portal users.
MCCI PROJECT-BASED SERVICES

MCCI PROJECT MANAGEMENT SERVICES
MCCI’s Laserfiche certified Team Member administer these services and concentrate on defining business requirements and the deliverables that follow. The MCCI Team Member will work with the Client’s point of contact to put together a project plan that clearly defines the scope of the Project Management services, ensuring the Client is prepared for the final project implementation. The total number of service hours is limited to the total fee quoted, divided by MCCI’s current Project Management rate.

CLIENT CONSULTATION
The assigned MCCI Project Manager will perform a consultation including a review of current document organization and retrieval practices to determine desired indexing methods, security rules, and other basic system set up needs. Once this information has been gathered and provided to the MCCI Project Manager, the basic folder structure, document naming conventions, and template set-up will be configured prior to onsite training.

REMOTE INSTALLATION AND CONFIGURATION
Software installation and configuration may occur remotely as part of the Project Management services to ensure the onsite time purchased is focused on the direct objectives. Please refer to the Pricing Section to determine if the onsite time will include installation and configuration.

REMOTE TRAINING
Project Management services may be utilized for training administrators or users remotely if onsite training is not included. Please refer to the Pricing Section to determine if training was quoted.

AVANTE TO RIO UPGRADE PACKAGE
MCCI DELIVERABLES
- MCCI will perform licensing update to upgrade the client to Rio and newest version of Laserfiche
- MCCI will install new Rio modules not currently owned by the client to not exceed: Directory Services, Web Access, Digital Signatures, Forms Essentials
- MCCI will train the Laserfiche Administrator on how to convert their Named User licensing from the Admin Console to Directory Services
- Directory Services will be installed on the same server as the Laserfiche Server
- Self-Signed SSL certificate will be utilized to run Directory Services, or the Client has a public SSL Certificate procured for the server on which LFDS will reside
- Converting users from Administration Console to Directory Services

EXCLUSIONS
- Server move unless listed
- Metadata Configuration
- Training

UPGRADE TO AVANTE PACKAGE
MCCI DELIVERABLES
- MCCI will perform licensing update to upgrade the client to Avante and newest version of Laserfiche
- MCCI will install new Avante modules not currently owned by the client to not exceed Web Access, Forms Essentials
- MCCI will train the Laserfiche Administrator on how to convert their Concurrent User Licensing to Named User Licensing
- Upgrade to newest version of Laserfiche unless listed
EXCLUSIONS

- Server move unless listed
- Metadata Configuration
- Training

LASERFICHE FILING WORKFLOW CONFIGURATION

MCCI’s Laserfiche Filing Workflow Configuration Services are designed to be highly collaborative. The goal is to provide a customized process that allows your organization to archive specified records in a proper format and location that is consistent with your organization’s standards. To execute, MCCI’s team of expert Project Managers and System Engineers will work with the Client’s Project Manager to build a Business Process in the Client’s Laserfiche environment.

MCCI DELIVERABLES

- Configure a Laserfiche Workflow including (Up To 15 Documents) for archival
  - Includes renaming of documents
  - Routing to appropriate folder structure
- Consultation with a MCCI Project Manager

CLIENT DELIVERABLES

- Provide MCCI with a mapped out narrative and flowchart of the specified business process
- Thoroughly define each resource and activity in the business process, including any exceptions
- Respond in a timely fashion to questions posed by MCCI’s Business Process Configuration team
- Appointment of Client Project Manager
- Availability of IT resources as needed and end users for interviews and Business Process testing
- Required Laserfiche software licensing

BUSINESS PROCESS CONFIGURATION SERVICES

Business Process Configuration Services are designed as an option for organizations that require advanced system configuration but may lack the time or expertise necessary to configure Workflow, Quick Fields, or any of Laserfiche’s other advanced modules. MCCI’s team of expert Project Managers and System Engineers will work in concert with the Client’s Project Manager to build a Business Process in the Client’s Laserfiche environment.

CLIENT DELIVERABLES

- Provide MCCI with a mapped out narrative and flowchart of the specified business process
- Thoroughly define each resource and activity in the business process, including any exceptions
- Respond in a timely fashion to questions posed by the Business Process Configuration team
- Appointment of Client Project Manager
- Availability of IT resources as needed
- Availability of end users for interviews and Business Process testing
- Required Laserfiche software licensing

MCCI DELIVERABLES

- Install and configure Laserfiche modules that are relevant to the implementation
- Consultation with a Laserfiche Project Manager
- Business Process Configuration Managed Services post implementation
  - The scope of Managed Services will be limited to supporting the process(es) implemented through this contract.
- Roll-out Assistance is an optional service if included in the scope of services.
  - The scope of Managed Services will be limited to supporting the process(es) implemented through this contract. Note: This service will be billed separately and is billed upon completion.
**LASERFICHE FORMS SERVICES**

MCCI’s Laserfiche Forms Services are designed to be highly collaborative. The goal is to provide a customized package for your organization. Whether you need direct assistance implementing Laserfiche Forms, or hands-on training to empower your organization to create and maintain electronic forms, or both, MCCI has options available. Please see your Pricing Section for the specific Laserfiche Forms Services quoted.

<table>
<thead>
<tr>
<th>Forms Configuration Services Per Form</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms Design Services</td>
<td>Up to 15 Fields</td>
<td>Up to 30 Fields</td>
<td>Up to 50 Fields</td>
</tr>
<tr>
<td>Create/modify form from the Business Process Library 10.1+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Form Field and Data Look-up Rules*</td>
<td>Up 10 Rules</td>
<td>Up to 20 Rules</td>
<td>Up to 40 Rules</td>
</tr>
<tr>
<td>Process Modeler Configuration</td>
<td>Up to 5 Steps</td>
<td>Up to 10 Steps</td>
<td>Up to 20 Steps</td>
</tr>
<tr>
<td>Workflow Configuration for Forms Process Modeler Integration, Filing Only</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Custom Scripting (JScript or CSS) *</td>
<td>Call for Quote</td>
<td>Call for Quote</td>
<td>Call for Quote</td>
</tr>
</tbody>
</table>

*NOTE

- Users submitting through the Forms Portal are limited to forms submission. Users cannot participate in the workflow/routing process within Laserfiche Forms Process Modeler or Laserfiche Workflow, unless they have a Laserfiche Named User License.
- All Forms Configuration Services are conducted remotely due to multiple decision points throughout the configuration, which may cause delays.
- Field Look-ups: Database Views and Queries must exist or be created by the Client prior to MCCI database lookup configuration.
- Java Script and CSS Scripting (if needed) are not included, unless otherwise notated in the Pricing Section.

**LASERFICHE CONNECTOR INTEGRATION CONFIGURATION & TRAINING**

**INCLUDES**

- Configuration of integration for up to one application screen with 3 standard actions on one machine
- Standard Actions Included: Scan, Import, Search Client, Search Weblink, and/or Search Web Access, launching from the desired application to Laserfiche
- Remote “Train the Trainer” training for up to half a business day to empower the Client to configure other integrations
- All data used for configuration must be available from the Application Screens
- All services are conducted remotely, unless a MCCI representative is onsite for other implementation needs and onsite time permits

**CLIENT DELIVERABLES**

- Application to be integrated with and user’s machine must meet Laserfiche Connector requirements set forth in the hardware requirements
- Testing – A test utility to ensure that the application screen is viable is available prior to purchase. Client is responsible for ensuring compatibility of applications prior to purchase
- IT resources – Appointment of Laserfiche Connector Administrator
- Laserfiche metadata requirements

**MCCI DELIVERABLES**

- Install and integrate Laserfiche connector within current Laserfiche system environment pursuant to the Laserfiche Connector requirements
- Assistance in configuring integration for one application screen with 3 standard action Connector Profiles on one machine
- Define Laserfiche metadata structure to support the specified integration
- Define Laserfiche security to support the integration
- Project Management services
- Remote Laserfiche Connector Administrator Training

**RATCHET-X CONFIGURATION SERVICES**
**INCLUDES**

- Configuration of integration for one application with up to three screen configurations identified during initial implementation
- Configuration pricing is based upon one application and up to three screens being configured at one time. Additional charges may apply if configurations of screens need to be broken up at different time frames.
- Base installation and configuration for actions that jump from the Application to Laserfiche
- Standard Actions Included: Scan, Import, Search Client, Search Weblink, and/or Search Web Access, launching from the desired application to Laserfiche
- All data used for configuration must be available from the Application Screens
- All services are conducted remotely, unless a MCCi representative is onsite for other implementation needs and onsite time permits
- For web-based solutions, screen configuration will be done based on Microsoft’s Internet Explorer Browser only. If other and/or multiple browser configurations are required, it must be stated in the Pricing Section.

*Client is responsible for testing to make sure needs are met prior to purchase.

**RATCHETX PER CUSTOM ACTIVITY DEVELOPMENT/CONFIGURATION:**
Includes any “Action” that is not listed as a Standard Action above, or any configuration that is required to have the integration points launch from Laserfiche back to the desired application, rather than from the application back to Laserfiche – Contact MCCi for Pricing Proposal.

**LASERFICHE – SHAREPOINT INTEGRATION ASSISTANCE**
MCCi’s Laserfiche SharePoint 2013 Integration Assistance service is designed to be highly collaborative. The goal is to provide the Client with a fully functional Laserfiche SharePoint Integration for the Client’s existing SharePoint 2013 implementation, along with the necessary knowledge to support the integration once the installation and configuration engagement is complete.

**CLIENT DELIVERABLES**

- Existing and stable on-premise on SharePoint 2013 or SharePoint 2010 solution. SharePoint Foundation is acceptable but does not include Search functionality.
- Provide a dedicated point of contact with sufficient server and directory services administrative rights to facilitate the required configuration tasks.
- Existing and stable Laserfiche Server and Web Access (9.1 or later) installation on Windows Server 2008 R2 or Windows Server 2012.
- Identify existing or configure new SharePoint site where the Laserfiche SharePoint Integration for SharePoint Repository and/or Search Web Parts will be installed and configured. Note: If the Laserfiche SharePoint Search integration is to be configured, SharePoint federated search feature must be configured and working properly.
- Troubleshoot and resolve server operating system, Internet Information Services, network or Kerberos related issues affecting the installation, configuration or functionality of any component of the Laserfiche SharePoint Integration for SharePoint. Note: If the client does not have the necessary skill set available to address these types of issues, the client should be prepared to engage a third-party support provider to assist.

**MCCI DELIVERABLES (REMOTE DELIVERY)**

- Installation of Laserfiche SharePoint Integration for SharePoint
- Configuration of Laserfiche SharePoint Repository and Search Web Parts
- Remote training on the use and configuration of Laserfiche SharePoint Repository and Search Web Parts
- In the event MCCi and the Client are unable to determine or agree on the root cause of an issue affecting the installation, configuration, or functionality of the Laserfiche SharePoint Integration for SharePoint and/or the Laserfiche SharePoint Repository and Search Web Parts, MCCi is responsible for opening the escalation case with Laserfiche Support.
  - In the event Laserfiche Support determines the root cause of an issue affecting the installation, configuration, or functionality of the Laserfiche SharePoint Integration for SharePoint and/or the Laserfiche SharePoint Repository and Search Web Parts to be
related to the server operating system, Internet Information Services, network or Kerberos, MCCi will remain available as necessary to assist the Client (if Client has expertise in these areas) or the Client’s third-party support provider to resolve the Laserfiche related components of the problem.

LASERFICHE ENERGOV INTEGRATION CONFIGURATION & TRAINING
INCLUDES
- Configuration services for up to 3 EnerGov Entity Types (EnerGov Plan, EnerGov Permit, etc.)
- Remote “Train the Trainer” training for up to half a business day to empower the Client to configure other available EnerGov Entity Types.
- All services are conducted remotely, unless a MCCi representative is onsite for other implementation needs and onsite time permits

CLIENT DELIVERABLES
- Desired EnerGov Fields for mapping metadata to Laserfiche
- IT resources – Appointment of a resource to work with MCCi for configuration and training
- Laserfiche metadata requirements
- Access to EnerGov technical staff and resources as needed
- If EnerGov “Intelligent Object” configuration is desired, it is the Client’s responsibility to configure the appropriate settings in EnerGov, or to work with EnerGov to do so. Intelligent Objects is the EnerGov feature that allows for creating letters and other documents and having them attached to EnerGov records. EnerGov configuration is needed to set this up and to have these documents treated as attachments to be stored in Laserfiche.

MCCI DELIVERABLES
- List of EnerGov fields available for mapping to Laserfiche
- Install integration (may require EnerGov technical resources for installation)
- Assistance in configuring up to 3 EnerGov Entity Types (EnerGov Plan, EnerGov Permit, etc.)
- Define Laserfiche metadata structure to support the specified integration
- Remote Configuration Training

DOCS ON THE CLOUD SERVER INSTANCES
MCCi offers Docs On The Cloud server instances to clients that would rather not acquire the physical or virtual infrastructure themselves. MCCi offers this service through a partner (Gordon Flesch Company, Inc.). They are the leading provider of hosted Laserfiche server instances. Unless noted otherwise, Docs On The Cloud server instances are hosted in AWS and include the creation, maintenance, and upgrades of purchased virtual machines, maintenance of operating system software, and daily backup snapshots of the hosted infrastructure. In addition, MCCi and the client have the following responsibilities:

MCCI RESPONSIBILITIES
Initial installation of Laserfiche software components and ongoing application of Laserfiche upgrades if client subscribes to MCCi’s Managed Services or Laserfiche Administration Services package. MCCi also serves as first tier for support issues and handles all billing related to the service.

CLIENT RESPONSIBILITIES
Serves as server and database administrator; maintains all non-Laserfiche and non-operating system applications, to include required database software acquisition, installation, maintenance, upgrades, and database maintenance routines.
MCCI CONSULTING SERVICES

BUSINESS PROCESS REQUIREMENTS GATHERING
The MCCi Business Process Requirement Gathering includes analysis by a senior project manager. MCCi staff will interview stakeholders regarding a defined department and/or business process that the organization desires to be automated through Laserfiche ECM. The deliverable of this on-site engagement will be a Statement of Work documenting cost, hours, and desired configuration of the defined business process.

BUSINESS PROCESS ANALYSIS
MCCI will work with the Client to document a current business process. By interviewing stakeholders and documenting facts and feedback, MCCi will deliver a comprehensive report. This engagement is typically done as a needs analysis exercise prior to automating an existing business process.

MCCI DELIVERABLES
Assignment of a project manager who will be responsible for:
- Acting as the main point of contact for MCCi
- Identifying and providing contact information for process stakeholders
- Coordinating and scheduling site visits so stakeholders are aware and set aside the appropriate amount of time to focus on working with MCCi
- Coordinating and scheduling conference calls/web meetings between process stakeholders and MCCi as part of the document review process
- Facilitating access to any/all resources needed for a thorough analysis
- Full participation by all process stakeholders in the interview, review, and finalization stages

CLIENT DELIVERABLES
Coordinating Introductory Call: Share contact information and review scope of project
Stakeholder Interviews: Up to two days onsite with a business analyst
- Conducting workshops and interviews with clients
- Document business processes on whiteboard during workshops and interviews
- Business Process Report Drafting & Review: Up to 30 hours
- Draft a business process/requirements document
- Review document with Client and make revisions where necessary.
- Business Process Report Delivery: Up to one day on-site with Business Analyst
- Onsite review and presentation of finalized report
- Editable copy of Business Process Report for future use

GAP ANALYSIS
The MCCi Gap Analysis is the study of the differences between two information systems or applications, often for determining how to bridge the space between where we are and where we want to be.

New Clients may be new to ECM or could be transitioning from another system. Existing Clients may consider Gap Analysis when looking to expand their system into other departments or enterprise-wide. It is also an opportunity to investigate and report on how Laserfiche is being used versus how it was intended to be used. Either way, Gap Analysis not only serves the consulting needs, but can also mitigate inherent risks in a new project. Risks such as scope creep, unforeseen needs (people, conversions, integrations, equipment), and unknown stakeholders can be identified and cleared up at the very beginning of the project.
MCCI DELIVERABLES
The Gap Analysis process involves determining, documenting, and approving the variance between business requirements and current capabilities. MCCi takes it a step further by providing recommendations and an action plan. The final deliverable is a report that is delivered to the Client in a format that can be edited. Any future changes to the report are the responsibility of the Client. The report will detail the following:

- A summary of the current document flow path with recommended changes/requirements
- Equipment, software, and staffing recommendations
- Storage needs for each department
- Recommendations on the timing of phasing in departments (based on needs/complexity)
- Implementation recommendations

The amount of time/cost of the Gap Analysis is dependent upon the system size and number of departments to be involved.

LASERFICHE CONSULTING SERVICES
MCCI’s Laserfiche Consulting Services are designed to leverage MCCi Laserfiche Certified Professionals on an annual basis. We consider ourselves an extension of your project team and assist in accomplishing your organization’s Laserfiche goals. Your organization is assigned a project manager to assist with designated projects, for up to an annual dollar amount each year. Rates charged are based on the type of resources required. Consulting services can be used for, but are not limited to:

- Business Process Requirements Gathering and SOW Drafting
- Status and Strategy Meetings (Required)
- Configuration of Client-Owned Laserfiche Components
- Training on Laserfiche Components and/or Configured Laserfiche Business Processes
- Laserfiche Integration/Developer Assistance

RECORDS MANAGEMENT CONSULTING
When implementing an enterprise-wide Electronic Records Management system, it is important for a Records Program and Records Policies to be in place beforehand. MCCi’s Records Management Consulting service focuses on revision and/or creation of such programs and policies. If needed, the service should be completed prior to implementing MCCi’s Laserfiche Records Management module. Pricing is dependent on the level of service needed and can be determined by setting up a meeting with MCCi and the appropriate Records Consultant. Services cover a broad spectrum including designing records management plans, designing systems, identifying records eligible for destruction, assisting with legal compliance, providing training and any other records and information related service requirement.

ENTERPRISE SYSTEM REVIEW OF LASERFICHE
AREAS OF REVIEW INCLUDE:

- Review of data structure (folder structure, metadata, etc.)
- Security review and configuration
- Current paper/electronic Forms review
- Current Workflow/Capture review
- Assess current training needs
- Interviews with departments not using Laserfiche
- Utilization of Laserfiche Records Management Module
- Integration/Mobile Access Needs

MCCI DELIVERABLES:

- Verbal report of findings while onsite
- Up to 5 hours of consulting for up to 30 days after onsite consultation

CLIENT REQUIREMENTS:
Attendance by CIO/IT Director, Application administrators, departmental managers, and any other leadership members
LASERFICHE TRAINING SERVICES
The Client is provided with instructor-led Laserfiche training, hands-on or train-the-trainer.

SYSTEM ADMINISTRATION TRAINING
- Client and Server Installation Procedure
- Security
- Tags
- Records Management
- System Settings
- Troubleshooting Procedures
- Users and Groups – Active Directory
- Templates
- Document Relationships
- Volumes
- Back Up Procedures
- Technical Support Overview

FULL USER TRAINING
- Introduction to Laserfiche
- OCR and Full Text Indexing
- Searching & Annotations
- Briefcases and Migrating
- Scanning and Importing
- Extracting a Document
- Folders and the Folder Browser
- Document Display
- Security
- Customize Laserfiche
- Index Card/Templates
- Volumes

RECORDS MANAGEMENT MODULE TRAINING
The Client should have full knowledge of internal records management policies and have prior experience in records management. This training will be quoted for clients with the Records Management functionality of Laserfiche.

BASIC OVERVIEW TRAINING FOR RECORDS MANAGEMENT
- Records Series
- Versioning
- Cutoff Criteria
- Hold Period
- Event Dispositions
- Destruction
- Records Folders
- Security Tags
- Cutoff Eligibility
- Disposition Actions
- Interim Transfers
- Permanent Records
- Document Links
- Vital Records
- Retention Period
- Time Dispositions
- Final Disposition
- Accession / Freezing

ADMIN CONSOLE SETUP FOR RECORDS MANAGEMENT
- Cycle Definitions Setup
- Retention Schedules Setup
- Locations Setup
- Cutoff Instructions Setup

BUSINESS PROCESS AUTOMATION TRAINING
Our Business Process Automation Training is designed to be highly collaborative. The goal is for the client to have a trained Business Process Automation Configuration Administrator specifically in Laserfiche Forms and Workflow. As a prerequisite, the clients Business Process Automation Configuration Administrator should be a business process savvy individual with good technical skills. This is the person tasked with handling future workflow and forms configurations, including any modifications needed to the configuration focused on during training.

CLIENT DELIVERABLES
- Provide MCCi with a mapped out/narrative of specified business process including metadata requirements and sample reports from functional activities involved. This will be used as an example for the training process, in an effort to leave the client with a start of a workflow configuration.
- Appointment of Business Process Automation Configuration Administrator who has been through Laserfiche Administrator training
- IT resources
MCCI DELIVERABLES
- Install and configure Laserfiche Workflow and Laserfiche Forms with current Laserfiche system
- Onsite Workflow Configuration Administrator Training
- Onsite Forms Designer and Process Modeler Training
- Workflow and Forms Managed Services post onsite training
- Configuration assistance for a period of time immediately following onsite training
- Developer Training (Applicable to Level 2 training package)

<table>
<thead>
<tr>
<th>Services Provided</th>
<th>Level 1</th>
<th>Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote Installation</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Onsite Training Days</td>
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<td>5</td>
</tr>
<tr>
<td>Workflow and Forms Configuration Assistance</td>
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<td>Remote 45 Days</td>
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<tr>
<td>Post Onsite Training</td>
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<td></td>
</tr>
<tr>
<td>Developer Training</td>
<td>None</td>
<td>Remote 1/2 Day</td>
</tr>
<tr>
<td>Developer Assistance Post Developer Training</td>
<td>None</td>
<td>Remote 15 Days</td>
</tr>
</tbody>
</table>

LASERFICHE WORKFLOW CONFIGURATION TRAINING
MCCI’s Laserfiche Workflow Configuration Training service is designed to be highly collaborative. The goal is for the Client to have a trained Workflow Configuration Administrator. As a prerequisite, the Client’s Workflow Configuration Administrator should be a business process savvy individual with good technical skills. This is the person tasked with handling future workflow configurations.

CLIENT DELIVERABLES
- Provide MCCI with a mapped-out narrative of specified business process including metadata requirements and sample reports from functional activities involved. This will be used as an example for the training process, so the Client will be left with a start of a workflow configuration.
- Appointment of Workflow Configuration Administrator who has been through Laserfiche Administrator training / IT resources

MCCI DELIVERABLES
- Install and configure Laserfiche Workflow with current Laserfiche system
- Onsite Workflow Configuration Administrator Training
- Workflow Managed Services post onsite training
  - Configuration assistance for a remote period immediately following onsite training
- Developer Training (Applicable to Level 2 training package)

<table>
<thead>
<tr>
<th>Services Provided</th>
<th>Filing Workflow</th>
<th>Level 1</th>
<th>Level 2</th>
</tr>
</thead>
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<td>Remote Installation</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
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<tr>
<td>Onsite Training Days</td>
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<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Workflow Configuration Assistance Post Onsite Training</td>
<td>Remote 30 Days</td>
<td>Remote 30 Days</td>
<td>Remote 45 Days</td>
</tr>
<tr>
<td>Developer Training</td>
<td>None</td>
<td>None</td>
<td>Remote 1/2 Day</td>
</tr>
<tr>
<td>Developer Assistance Post Developer Training</td>
<td>None</td>
<td>None</td>
<td>Remote 15 Days</td>
</tr>
</tbody>
</table>

LASERFICHE FORMS TRAINING
MCCI’s Laserfiche Forms Services are designed to be highly collaborative. The goal is to provide a customized package for your organization. Whether you need direct assistance implementing Laserfiche Forms, or hands-on training to empower your organization to create and maintain electronic forms, or both, MCCI has options available. Please see your Pricing Section for the specific Laserfiche Forms Services quoted.
<table>
<thead>
<tr>
<th>Forms Training Services Provided</th>
<th>Essentials</th>
<th>Professional Overview</th>
<th>Professional Comprehensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Duration</td>
<td>Up to 4 Hours Remote</td>
<td>Up to 1 Day Onsite</td>
<td>Up to 2 Days Onsite</td>
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<tr>
<td>Forms Designer</td>
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<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Process Modeler</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Workflow Configuration (For Forms Process Modeler Integration, and Filing Only)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
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<tr>
<td>Forms Configuration (Up to 1 - Level 1 Form)</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Tab 8- Value Added Products and Services

Include any additional products and/ or services available that vendor currently performs in their normal course of business that is not included in the scope of the solicitation that you think will enhance and add value to this contract for Region 14 ESC and all NCPA participating entities.

JUSTFOIA

COMPANY HISTORY
MCCi, a subsidiary of Municipal Code Corporation (The nation’s leading codifier for local government), has been providing Electronic Records Management Solutions to its clients since 1998. With a client base of over 740 government agencies and satellite offices across the country, we are striving to be the leading Electronic Records Management provider in the United States.

In 2013, MCCi put together a customer focus group and collaborative initiative to develop a better method of recording, tracking, and fulfilling Open Records Requests. The result was a hosted and affordable solution on the most user-friendly platform: JustFOIA.

ADOBE ACROBAT PRO PLUGIN
With the Adobe Acrobat Pro Plugin, you can easily upload documents you are working on in Adobe to a specific JustFOIA request. Use Adobe to create and edit documents, as well as to apply redactions and other features available in the Adobe software. When you are ready, you simply click on the JustFOIA button in the menu bar and uploading that document to JustFOIA is as easy as picking the request number. In order to utilize this plugin, your organization will need to have Acrobat Pro available to the user.

LASERFICHE INTEGRATION
Our Laserfiche integration makes it easy to leverage the power of Laserfiche to help fulfill records requests. Do all of your searching, editing, and redaction in Laserfiche. Then with a click of the JustFOIA menu button send selected documents directly into the response documents of the specific JustFOIA request you choose. This integration makes it more seamless to use Laserfiche and JustFOIA together to complete records requests. In order to utilize this integration, each user will need a full Laserfiche license.

PAYMENT PORTAL
This feature requires an account with Authorize.net, which is the third-party payment processor for this integration. Authorize.net handles all monetary transactions and sensitive credit card data. JustFOIA integrates with Authorize.net to give you the ability to collect payments from requestors online. The requestor goes to your site and enters in the request number/security key and is able to see any fees that they owe. If they owe fees, they are able to pay through a secure authorize.net site. Once they pay, you can make their request documents available for immediate download.

REMOTE CONFIGURATION – Configuration services are provided remotely. As part of the standard configuration services MCCi will work with the client to configure up to two Records Request Intake Processes, Unlimited users, as well as the departments, and security rights. The configuration of all forms and processes are to be completed as part of the initial project; if the client desires to take advantage of configuring a second process, it must be done as part of the initial configuration services and prior to training. Subsequent form/process configurations and users will be configured by the client, or the client may contract with MCCi for additional services.

REMOTE TRAINING – JustFOIA is a simple and easy to use solution, therefore all training is provided remotely. One remote user training session is included for each form process that is being configured. In addition, one administrative training is included for the organization. All training is conducted in a train the trainer format. Onsite live training can be conducted at a negotiated rate.
**JUSTFOIA LICENSING AND FEATURES** - JustFOIA is an Open Records Request Tracking Solution. It allows you to record, track, fulfill, and report on the records request process. Below are the feature sets offered:

- **Public Facing Form Site** – Online public request form accessible through client’s website.
- **Email Notifications** – Status and department updates, automated reminders as well as daily digest and alert notifications.
- **Correspondence** – Emails can be generated within the system and tracked under the specific request. Emails can be custom created or through pre-configured templates. In addition, other forms of correspondence related to a request can be tracked (phone calls, letters or in person conversations).
- **Fee Tracking** – Track fees, due dates, and payments.
- **On-Premise Archival** – Export capabilities for archiving record request data locally.
- **Proactive Status Reporting** – Dashboard interface allows for immediate status update.
- **Performance Metric Reports** – Measure processing times by request type, department or user.
- **Global Reporting** – Measure performance for all departments and request types.
- **Configurable Intake Form** – Client branded intake form that can be configured remotely or locally.
- **Mobile compatible** – Compatible with most cellular devices.
- **Public Portal** – Requesters can track their request through a secured private portal. Status updates, invoices and request documents can all be provided for the requester.
- **Payment Portal (Optional)** - Requestors can view or print the invoice and make partial or whole payments. This feature requires an account with Authorize.net, which is the third-party payment processor for this integration. Authorize.net handles all monetary transactions and sensitive credit card data.

**HARDWARE/SOFTWARE REQUIREMENTS**

JustFOIA is a completely web-based hosted solution and therefore has no server-side hardware components. End-user access is provided through a web interface, which means no client-side software is required. We test and support the following browsers: Microsoft® Internet Explorer® version 10 or higher; Google Chrome™, most recent stable version; Mozilla® Firefox®, most recent stable version; Apple® Safari® most recent stable version.
Granicus

GRANICUS SOLUTIONS
Granicus Legislative Management is a comprehensive, agenda workflow management and information retrieval system designed specifically to support the Legislative process. Granicus Open Platform is a pre-requisite for utilizing the Granicus Legislative Management Suite.

GRANICUS® OPEN PLATFORM
The Granicus® Open Platform is the cloud-based foundation for all Granicus applications. It allows government organizations to manage and store an unlimited amount government public meeting data. It is the core of our content management, administration and distribution tools and includes free access to our APIs and SDKs, helping you seamlessly connect your Granicus solution to systems in place. The Granicus Platform includes the ability to upload and publish content including videos and documents.

- Unlimited content storage and distribution
- Open architecture and SDK
- Archived video editing and indexing
- Citizen web portal
- On-demand streaming to mobile devices*

* Available for on-demand playback only

GRANICUS® LEGISLATIVE MANAGEMENT SUITE
The Legislative Management Suite offers a complete and automated agenda workflow solution. Create agenda items and assign them to the appropriate agenda, making agenda creation seamless. Item approvals are done automatically – approvers are notified when it’s their turn to review. Seamlessly connect agenda data to the iPad to review agendas and support documents, take notes and more through the iLegislate application. Capture all meeting actions after the meeting into the public record. Plus, you can organize and store electronic documents of any file format in one repository. All documents are automatically tagged and indexed, making search and retrieval easy. This Suite also allows you to track legislation from inception through approvals and actions taken.

- Agenda item drafting
- Electronic approval process
- Agenda packet generation and publication
- Organize, store and retrieve documents
- Continuous legislative workflow
- Track and search legislative data

OPTIONAL GRANICUS MODULES

GOVERNMENT TRANSPARENCY SUITE
The Government Transparency Suite gives your citizens greater access to public meetings and records online. Take the next step towards transparency and stream meetings and events live, link related documents to your video and provide advanced searching of archives. The Government Transparency Suite gives you unlimited cloud bandwidth and storage as well as local live and on-demand streaming for up to 50 concurrent viewers. This Suite also allows you to connect agenda data to the iPad to review agendas and supporting documents, take notes and more through the iLegislate application.

- Stream unlimited meeting bodies and events live
- Intelligent media routing
• Index video in real-time and link to relevant materials
• Build reports and analytics on visitor trends
• Paperless agenda for the iPad
• Offer downloadable media formats

**MEETING EFFICIENCY SUITE**

The Meeting Efficiency Suite is a live meeting workflow solution that combines minutes with a meeting’s recording. Capture and publish minutes, saving staff time and cutting administrative costs. Record roll-call, agenda items, speakers, motions, votes, and notes through a simple interface. After the meeting, finalize minutes quickly and easily in Microsoft Word™. With VoteLog, allow the public to track legislation, ordinances and even voting member records through your website. This Suite also allows you to seamlessly integrate with agenda solutions already in place.

• Meeting preparation tools
• Live minutes automation
• Quick notes and text expansion
• Minutes editing and publishing
• Generate linked minutes

**ELECTRONIC VOTING AND PUBLIC DISPLAYS (SUITE ADD-ONS)**

This addition to the Meeting Efficiency Suite gives elected officials a new way to participate in public meetings using touch-screen displays to record motions and votes as well as request to speak. View full agendas, supporting materials, the current item, speakers and vote results all from the touch-screen display. Record actions directly from elected members and ensure greater accuracy. Help your audience follow fast-paced meetings with a public display that shows current item, vote results and more.

• Touch-screen displays
• Digital speaker queue
• Vote and roll call automation
• Review paperless agenda packets

**GRANICUS LEGISLATIVE MANAGEMENT SUITE – LASERFICHE INTEGRATION**

The integration services between Granicus Legislative Management and Laserfiche allow documents residing within a specific Laserfiche repository, to be attached directly to a legislative item, from within the Granicus Legislative Management interface. In addition, a user can easily archive Granicus Legislative Management reports into a specific Laserfiche repository.

**GRANICUS LEGISLATIVE MANAGEMENT SUITE - MUNICODE INTEGRATION**

Municipal Code Corporation and Granicus Legislative Management have partnered in an effort to connect the Legislative management process with your codification process. This service is a federated search between Granicus Legislative Management’s InSite (Public Portal) and the online codification hosted by Municipal Code Corporation. This integration allows constituents to look up your official code through the common InSite query by launching a consecutive search on the MuniCode site and simultaneously displaying search results from the official codification. As a pre-requisite, your code of ordinances must be hosted by Municipal Code Corporation.”
ABBYY FlexiCapture—Advanced Data Capture

ABBYY FlexiCapture is a powerful data capture software that works with precision accuracy to convert paper and image documents into business-ready data. ABBYY FlexiCapture automates resource-consuming tasks such as data entry, document separation and classification to significantly reduce the time it takes to deliver the data to business processes.

ABBYY FlexiCapture for Invoices

ABBYY FlexiCapture for Invoices is a turnkey capture solution that replaces costly manual data entry with efficient automated invoice processing. By enabling early capture of invoices and centralized extraction and validation of data, it reduces the cost of paying an invoice, improves visibility into the payment cycle and increases the accuracy of analysis and forecasting. Some of the benefits of AP automation with FlexiCapture:

- **Immediate Visibility**: Invoices are automatically captured at the point of arrival.
- **Higher Efficiency**: Only invoices with errors, discrepancies, or violations of business terms are brought to your attention.
- **Greater Control**: Early capture and classification of invoices by electronic approval. Invoices can automatically be routed to the proper approvers according to supplier, purchasing department and amounts.
- **Low-risk Optimization**: Deploys a standalone capture module and is infrastructure agnostic. Works with your existing AP, ERP, workflow or business intelligence tools and enhances them with high quality automated data capture.

FlexiCapture Functionality

ABBYY FlexiCapture for Invoices offers configurations ranging from single-user systems to client-server enterprise-wide solutions for organizations with multiple accounting groups. It can also be deployed in a shared service center and gather invoices captured at multiple remote points into a single workflow. In addition to processing invoices, ABBYY FlexiCapture can be extended to address the capture needs of an entire organization. One system can be used to classify and process documents originating in various departments and business units, including remote ones. Including:

- Multi-Channel Capture
- Extraction of Data
- Ergonomic Date Verification Tools
- Straight-Through Processing
- Automatic Classification
- On-The-Fly Training
- Purchase Order Matching
- Archive Ready
Scanning

Depending on the project, MCCi has had success using both the Waterfall and Agile models for Project Management.

In an Agile based project, MCCi still spends time developing a focused scope that targets the client’s specific requirements. The primary benefit of using an Agile methodology is that clients benefit from the opportunity to see regular updates and influence the final design of the repository and Workflows during the course of the project.

Projects always start with a Kickoff meeting, which allows MCCi Sales and Project Management teams to come together with the Client to discuss expectations and ensure all parties are on the same page. During the Kickoff meeting, MCCi’s Project Manager sets the schedule with the Client for Requirements Gathering and implementation of infrastructure needed to support the Laserfiche system. Once servers are set up and allocated, an MCCi Systems Engineer will install and configure the Laserfiche software. We often try to have the servers ready during the Requirements Gathering meetings, so that the MCCi Project Manager and Systems Engineer can visually build out the repository while the client’s administrator is able to watch. In the event the County goes with the SaaS model the server installation would not apply.

The objective of Requirements Gathering meetings is to help lay out the “metadata” and retention requirements for each identified Document Type that will be stored in Laserfiche. This information will be key to determine to help with the scanning part of the project.

After configuration of the system is complete, the Project Manager will schedule on-site training with the client’s administrators and end-users. Depending on the client’s preference, this may be a train-the-trainer style training, or we may train every employee that will use the system.

Throughout the implementation, MCCi’s Support Team is monitoring the status of the project in the background. This ensures that when we transition the project from an active project to our Support team, they are better enabled to support the client’s ongoing needs. We are passionate about client success, not only because it supports our business growth, but we also take pride in the work that we do.

Below is an example of the flow for a project in terms of deliverables. Actual order of phases and implementation timelines will be determined between MCCi and Client’s project team to evaluate priorities and available resources:

**Project Management – Requirements Gathering**
- Deliverable – On-site interviews and discussion of project objectives. Written analysis and recommendations for repository and workflow design.

**Project Management - Document Type, System Layout, Retention Review**
- Deliverable – Mock ups of record retention folder structure, document templates

**Project Management - Implementation of Review**
- Deliverable – configuration work performed in the Laserfiche repository for Retention Schedules and Records Series, folder structure, indexing

**Security Review and Implementation**
- Deliverable – Review by a Laserfiche Systems Engineer to ensure that the new folder structure doesn’t inadvertently result in access to Records by employees that are unauthorized
On-site Record Management Training
- Deliverable – training on the Laserfiche Records Management Edition modules, as well as the Policies and Procedures associated with the implemented recommendations.

User Acceptance Testing
- Deliverable – training on the new folder structure, as well as the Policies and Procedures associated with the implemented recommendations.

Additional On-site Training
- Deliverable – training on the new folder structure, as well as the Policies and Procedures associated with the implemented recommendations.

MCCI primarily utilizes an application called Basecamp to manage our projects. Basecamp is a commonly utilized Project Management tool that will allow for the Client to monitor the status of the project and provide their own updates in the same web based environment used by MCCI. At the beginning of the project, all of the milestones and tasks required to complete the project will be itemized in Basecamp by the MCCI Project Manager responsible for this project. The Client’s project stakeholders will be added to the Basecamp project, allowing them to log in and view outstanding tasks, including each task’s due date and assignment. For a preview of how Basecamp is an excellent collaboration tool, we suggest visiting [http://basecamp.com/tour](http://basecamp.com/tour)

MCCI is focused on delivering the county a turnkey solution, not just scanning and indexing the County’ records. Our quality control and quality assurance focuses on preparation of records, scanning & quality control, delivery and import of records into the client’s system. Our Laserfiche Project Manager will work with scanning staff to ensure a successful project.

Quality Control & Assurance

MCCI is focused on delivering the County a complete solution, not just scanning and indexing the City’s records. Our quality control and quality assurance focuses on evaluating records for condition and other factors, preparation of records, scanning & quality control, delivery and import of records into the client’s system. Since MCCI would be setting up the Laserfiche system, we would be architecting it based on the intended use. We plan to use this information to make sure all scanned documents are incorporated into the current Laserfiche system in a manner that will allow for optimal use and benefit. MCCI will deliver data as a Laserfiche briefcase, matching existing templates in the County’s Laserfiche system to avoid duplication. This process will result in a much easier experience for County personnel as they will have peace of mind knowing the records will be imported correctly with little or no effort by staff. We would do a review of the current Laserfiche system to help with architecture for imported files.

Image Processing, Quality Control & Assurance

MCCI understands the care needed to ensure that government documents are properly preserved electronically. Our goal is that the final product will be utilized by County staff and citizens indefinitely.

Timeline

The timeline will vary based on the option chosen by County. MCCI will work with the County to schedule a pickup date for boxed documents. Once the documents are at our facility, we will begin work.
While completing the project in a timely manner is important, MCCi values the quality and accuracy of the project more than the speed at which it is completed. During the project any records requests are typically handled within one business day of the request.

**Secure Document Transportation**
Documents will be inventoried, picked up, signed for by the driver, and transported to our secure facility for preparation and processing. Once they arrive they will be signed in by a supervisor, inventoried into our facility, labeled and secured until the work processes begin.

**Document Processing**
Our plan is specifically designed to review and monitor the quality of the customer's information throughout the entire imaging process. As the work passes through each phase of the imaging process, it is quality checked randomly by unit. Upon reaching the final phase of the imaging process, we will have produced a quality product that multiple persons have reviewed prior to delivery, and the customer can be assured that we have taken many precautions to prevent unacceptable images/indexes. The inspection process focuses on four primary areas of concern: 1. Document separation 2. Page capture 3. Image clarity 4. Indexing integrity.

**Prepping**
Prepping starts with clear written prepping instructions so that each person prepping documents understands the process. MCCi will work with the County to ensure accurate instructions. Each member of the prep team will be trained on how to properly prep the document. After initial prep is done, random samples are reviewed within each prepped box. The review verifies that our personnel are adhering to MCCi’s strict standard of excellence. After all prepping QC has been performed, documents can move to the scanning phase.

**Scanning**
We review scanner settings, proper separation of files and boxes, etc. We review images during the scanning process to make sure image clarity and page capture is hitting proper standards. Samples are reviewed within each scanned box and compared to scanned images. The review verifies that our personnel are adhering to the job specifications. The County will review the first set of scanned images to confirm quality is meeting expectations. MCCi uses a variety of scanners such as: Cannon G1130 Large Format Scanner: Contex Premier G600 Plus

**Final QC**
Quality control happens throughout the lifecycle of image processing, so the final QC centers around making sure project specifications were followed. Random samplings to review proper prepping, scanning, and indexing have been done. Scanned images will be reviewed in order to look for missing pages, blank pages, rotated pages, and other obvious issues that did not meet project specifications.

**Import of Records**
MCCi is including import services to ensure that scanned records can be easily imported into the County’s system and filed in the proper location, decreasing the workload on the City. Our staff are experts on importing records, Laserfiche best practices, architecture standards, and templates/metadata.

**Quality Assurance Is a Team Effort**
Quality assurance is met in partnership with MCCi and the County as the owner of the source documents. Upon receipt of delivery from the MCCi, The County should do the following to ensure accuracy, quality and timely storage:
• Verify general contents of shipment match plan
• Spot check documents to assure proper order according to scope.
• Inspect chain of custody document
• Send documents to an area to be further validated against digital images.
• Let MCCI know as soon as possible if there are any errors or issues found.

The quality control steps provided by MCCI are designed to detect and correct errors in the production process, and quality assurance is designed to verify the validity and accuracy of the overall delivered product. We know that it takes a team approach for a successful and quality project and look forward to working with the staff on ensuring the highest quality result.

MCCI also has a cyber insurance policy that is documented in our insurance documentation to show our focus on security.
Clean Air and Water Act & Debarment Notice

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 11738 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, “Debarment and Suspension”, as described in the Federal Register and Rules and Regulations.

<table>
<thead>
<tr>
<th>Potential Vendor</th>
<th>MCCi, LLC.</th>
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<tbody>
<tr>
<td>Print Name</td>
<td>Donny Barstow</td>
</tr>
<tr>
<td>Address</td>
<td>1958A Commonwealth Lane</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>Tallahassee, FL 32303</td>
</tr>
<tr>
<td>Authorized signature</td>
<td>[Signature]</td>
</tr>
<tr>
<td>Date</td>
<td>3/15/2018</td>
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Contractor Requirements

Contractor Certification

Contractor's Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statues of the states it is will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The offeror complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the NCPA Participating entities in which work is being performed

Fingerprint & Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The offeror shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed

Business Operations in Sudan, Iran

In accordance with A.R.S. 35-391 and A.R.S. 35-393, the Contractor hereby certifies that the contractor does not have scrutinized business operations in Sudan and/or Iran.

Authorized signature

Date: 3/15/2018
Antitrust Certification Statements (Tex. Government Code § 2155.005)

I affirm under penalty of perjury of the laws of the State of Texas that:

(1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

(2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;

(3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and

(4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

<table>
<thead>
<tr>
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<tbody>
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<tr>
<td>City/State/Zip</td>
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</tr>
<tr>
<td>Telephone No.</td>
<td>(850) 701-0725</td>
</tr>
<tr>
<td>Fax No.</td>
<td>(850) 564-7496</td>
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<tr>
<td>Email address</td>
<td><a href="mailto:dwb@mccinnovations.com">dwb@mccinnovations.com</a></td>
</tr>
<tr>
<td>Printed name</td>
<td>Donny Barstow</td>
</tr>
<tr>
<td>Position with company</td>
<td>President</td>
</tr>
<tr>
<td>Authorized signature</td>
<td>[Signature]</td>
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</table>
FEMA Standard Terms and Conditions Addendum for Contracts and Grants

If any purchase made under the Master Agreement is funded in whole or in part by Federal Emergency Management Agency ("FEMA") grants, Contractor shall comply with all federal laws and regulations applicable to the receipt of FEMA grants, including, but not limited to the contractual procedures set forth in Title 44 of the Code of Federal Regulations, Part 13 ("44 CFR 13").

In addition, Contractor agrees to the following specific provisions:

1) Pursuant to 44 CFR 13.36(6)(1), University is entitled to exercise all administrative, contractual, or other remedies permitted by law to enforce Contractor's compliance with the terms of this Master Agreement, including but not limited to those remedies set forth at 44 CFR 13.43.

2) Pursuant to 44 CFR 13.36(6)(2), University may terminate the Master Agreement for cause or convenience in accordance with the procedures set forth in the Master Agreement and those provided by 44 CFR 13.44.

3) Pursuant to 44 CFR 13.36(6)(3)-(6)(12), and (13), Contractor shall comply with the following federal laws:
   a. Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity," as amended by Executive Order 11375 of October 13, 1967, and as supplemented in Department of Labor ("DOL") regulations (41 CFR Ch. 60);
   b. Copeland "Anti-Kickback" Act (18 U.S.C. 874), as supplemented in DOL regulations (29 CFR Part 23);
   c. Davis-Bacon Act (40 U.S.C. 276a-276a-7) as supplemented by DOL regulations (29 CFR Part 5);
   d. Section 103 and 107 of the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-30) as supplemented by DOL regulations (29 CFR Part 5);
   e. Section 306 of the Clean Air Act (42 U.S.C. 1857h), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15); and
   f. Mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation play issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871).

4) Pursuant to 44 CFR 13.36(6)(7), Contractor shall comply with FEMA requirements and regulations pertaining to reporting, including but not limited to those set forth at 44 CFR 40 and 41.

5) Pursuant to 44 CFR 13.36(6)(8), Contractor agrees to the following provisions 72 regarding patents:
   a. All rights to inventions and/or discoveries that arise or are developed, in the course of or under this Agreement, shall belong to the participating agency and be disposed of in accordance with the participating agencies policy. The participating agency, at its own discretion, may file for patents in connection with all rights to any such inventions and/or discoveries.

6) Pursuant to 44 CFR 13.36(6)(9), Contractor agrees to the following provisions regarding copyrights:
   a. If this Agreement results in any copyrightable material or inventions, in accordance with 44 CFR 13.34, FEMA reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish or otherwise use, for Federal Government purposes:
      1) The copyright in any work developed under a grant or contract; and
      2) Any rights of copyright to which a grantee or a contractor purchases ownership with grant support.

7) Pursuant to 44 CFR 13.36(6)(10), Contractor shall maintain any books, documents, papers, and records of the Contractor which are directly pertinent to this Master Agreement. At any time during normal business hours and as often as the participating agency deems necessary, Contractor shall permit participating agency, FEMA, the Comptroller General of United States, or any of their duly authorized representatives to inspect and photocopy such records for the purpose of making audit, examination, excerpts, and transcriptions.

8) Pursuant to 44 CFR 13.36(6)(11), Contractor shall retain all required records for three years after FEMA or participating agency makes final payments and all other pending matters are closed. In addition, Contractor shall comply with record retention requirements set forth in 44 CFR 13.42.
Required Clauses for Federal Assistance provided by FTA

ACCESS TO RECORDS AND REPORTS

Contractor agrees to:

a) Maintain all books, records, accounts and reports required under this Contract for a period of not less than three (3) years after the date of termination or expiration of this Contract or any extensions thereof except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case Contractor agrees to maintain same until Public Agency, the FTA Administrator, the Comptroller General, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.

b) Permit any of the foregoing parties to inspect all work, materials, payrolls, and other data and records with regard to the Project, and to audit the books, records, and accounts with regard to the Project and to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed for the purpose of audit and examination.

FTA does not require the inclusion of these requirements of Article 1.01 in subcontracts. Reference 49 CFR 18.39 (i)(11).

CIVIL RIGHTS / TITLE VI REQUIREMENTS


2) Equal Employment Opportunity. The following Equal Employment Opportunity requirements apply to this Contract:

   a. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal Transit Law at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable Equal Employment Opportunity requirements of U.S. Dept. of Labor regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor, 41 CFR, Parts 60 et seq., and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may in the future affect construction activities undertaken in the course of this Project. Contractor agrees to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, marital status, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, Contractor agrees to comply with any implementing requirements FTA may issue.

employees. In addition, Contractor agrees to comply with any implementing requirements FTA may issue.


d. Segregated Facilities. Contractor certifies that their company does not and will not maintain or provide for their employees any segregated facilities at any of their establishments, and that they do not and will not permit their employees to perform their services at any location under the Contractor’s control where segregated facilities are maintained. As used in this certification the term “segregated facilities” means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion or national origin because of habit, local custom, or otherwise. Contractor agrees that a breach of this certification will be a violation of this Civil Rights clause.

3) Solicitations for Subcontracts, Including Procurements of Materials and Equipment. In all solicitations, either by competitive bidding or negotiation, made by Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by Contractor of Contractor’s obligations under this Contract and the regulations relative to non-discrimination on the grounds of race, color, creed, sex, disability, age or national origin.

4) Sanctions of Non-Compliance. In the event of Contractor’s non-compliance with the non-discrimination provisions of this Contract, Public Agency shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to: 1) Withholding of payments to Contractor under the Contract until Contractor complies, and/or; 2) Cancellation, termination or suspension of the Contract, in whole or in part.

Contractor agrees to include the requirements of this clause in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

DISADVANTAGED BUSINESS PARTICIPATION

This Contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, “Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs”, therefore, it is the policy of the Department of Transportation (DOT) to ensure that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, have an equal opportunity to receive and participate in the performance of DOT-assisted contracts.

1) Non-Discrimination Assurances. Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. Contractor shall carry out all applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or other such remedy as public agency deems appropriate. Each subcontract Contractor signs with a subcontractor must include the assurance in this paragraph. (See 49 CFR 26.13(b)).
2) **Prompt Payment.** Contractor is required to pay each subcontractor performing Work under this prime Contract for satisfactory performance of that work no later than thirty (30) days after Contractor’s receipt of payment for that Work from public agency. In addition, Contractor is required to return any retainage payments to those subcontractors within thirty (30) days after the subcontractor’s work related to this Contract is satisfactorily completed and any liens have been secured. Any delay or postponement of payment from the above time frames may occur only for good cause following written approval of public agency. This clause applies to both DBE and non-DBE subcontractors. Contractor must promptly notify public agency whenever a DBE subcontractor performing Work related to this Contract is terminated or fails to complete its Work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. Contractor may not terminate any DBE subcontractor and perform that Work through its own forces, or those of an affiliate, without prior written consent of public agency.

3) **DBE Program.** In connection with the performance of this Contract, Contractor will cooperate with public agency in meeting its commitments and goals to ensure that DBEs shall have the maximum practicable opportunity to compete for subcontract work, regardless of whether a contract goal is set for this Contract. Contractor agrees to use good faith efforts to carry out a policy in the award of its subcontracts, agent agreements, and procurement contracts which will, to the fullest extent, utilize DBEs consistent with the efficient performance of the Contract.

**ENERGY CONSERVATION REQUIREMENTS**

Contractor agrees to comply with mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plans issued under the Energy Policy and Conservation Act, as amended, 42 U.S.C. Sections 6221 et seq. and 41 CFR Part 301-10.

**FEDERAL CHANGES**

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures and directives, including without limitation those listed directly or by reference in the Contract between public agency and the FTA, as they may be amended or promulgated from time to time during the term of this contract. Contractor’s failure to so comply shall constitute a material breach of this Contract.

**INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS**

The provisions include, in part, certain Standard Terms and Conditions required by the U.S. Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by the DOT, as set forth in the most current FTA Circular 4220.1f, dated November 1, 2008, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. Contractor agrees not to perform any act, fail to perform any act, or refuse to comply with any public agency requests that would cause public agency to be in violation of the FTA terms and conditions.

**NO FEDERAL GOVERNMENT OBLIGATIONS TO THIRD PARTIES**

Agency and Contractor acknowledge and agree that, absent the Federal Government’s express written consent and notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to agency, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract.
Contractor agrees to include the above clause in each subcontract financed in whole or in part with federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS

Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 et seq. and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of the underlying Contract, Contractor certifies or affirms the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made, pertaining to the underlying Contract or the FTA assisted project for which this Contract Work is being performed.

In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on Contractor to the extent the Federal Government deems appropriate.

Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307 (n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

Contractor agrees to include the above clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.
State Notice Addendum

Pursuant to certain state notice provisions the following public agencies and political subdivisions of the referenced public agencies are eligible to access the contract award made pursuant to this solicitation. Public agencies and political subdivisions are hereby given notice of the foregoing request for proposal for purposes of complying with the procedural requirement of said statutes:


Other States: Cities, Towns, Villages, and Boroughs

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<thead>
<tr>
<th>No.</th>
<th>Cities, Towns, Villages and Boroughs in Oregon</th>
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<tbody>
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<td>1</td>
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<td>CITY COUNTY INSURANCE SERVICES</td>
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3. ADDICTIONS RECOVERY CENTER, INC
4. ALLIOURONE/CRESTVIEW CONFERENCE CTR.
5. ALVORD-TAYLOR INDEPENDENT LIVING SERVICES
6. ALZHEIMERS NETWORK OF OREGON
7. ASHLAND COMMUNITY HOSPITAL
8. ATHENA LIBRARY FRIENDS ASSOCIATION
9. BARLOW YOUTH FOOTBALL
10. BAY AREA FIRST STEP, INC.
11. BENTON HOSPICE SERVICE
12. BETHEL CHURCH OF GOD
13. BIRCH COMMUNITY SERVICES, INC.
14. BLACK HILLS ELECTRIC COOPERATIVE
15. BLIND ENTERPRISES OF OREGON
16. BONNEVILLE ENVIRONMENTAL FOUNDATION
17. BOYS AND GIRLS CLUBS OF PORTLAND METROPOLITAN AREA
18. BROAD BASE PROGRAMS INC.
19. CARNBY FOUR SQUARE CHURCH
20. CANCER CARE RESOURCES
21. CASCADEI behaviour HEALTHCARE
22. CASCADEI REGION GREEN BUILDING COUNCIL
23. CATHOLIC CHARITIES
24. CATHOLIC COMMUNITY SERVICES
25. CENTER FOR RESEARCH TO PRACTICE
26. CENTRAL BIBLE CHURCH
27. CENTRAL CITY CONCERN
28. CENTRAL DOUGLAS COUNTY FAMILY YMCA
29. CENTRAL OREGON COMMUNITY ACTION AGENCY NETWORK
30. CHILDREN'S MONTessori
31. CITY BIBLE CHURCH
32. CLOVERLEAF RIVER WATERS
33. CLASSROOM LAW PROJECT
34. COAST REHABILITATION SERVICES
35. COLLEGE HOUSING NORTHWEST
36. COLUMBIA COMMUNITY MENTAL HEALTH
37. COMMUNITY ACTION ORGANIZATION
38. COMMUNITY ACTION TEAM, INC.
39. COMMUNITY CANCER CENTER
40. COMMUNITY HEALTH CENTERS, INC
41. COMMUNITY VETERINARY CENTER
42. CONCERNED TRIBES OF GRAND RONDE
43. CONSERVATION BIOLOGY INSTITUTE
44. CONTEMPORARY CRAFTS MUSEUM AND GALLERY
45. CORVALLIS MOUNTAIN RESCUE UNIT
46. CROOKSTON CHRISTIAN HOSPITAL
47. COVENANT RETIREMENT COMMUNITIES
48. DECISION SCIENCE RESEARCH INSTITUTE, INC.
49. DELIGHT VALLEY CHURCH OF CHRIST
50. DOGS FOR THE DEAF, INC.
51. DOUGLAS ELECTRIC COOPERATIVE, INC.
52. EAST HILL CHURCH
53. EAST SIDE FOUR SQUARE CHURCH
54. EAST WEST MINISTRIES INTERNATIONAL
55. EDUCATIONAL POLICY IMPROVEMENT CENTER
56. ELMIRA CHURCH OF CHRIST
57. EMBASSY PUB
58. EMMAUS CHRISTIAN SCHOOL
59. EM AVANT, INC.
60. ENTERPRISE FOR EMPLOYMENT AND EDUCATION
61. EUGENE BALLET COMPANY
62. EUGENE SYMPHONY ASSOCIATION, INC.
63. EUGENE WATER & ELECTRIC BOARD
64. EVERGREEN AVIATION MUSEUM AND CAP, MICHAEL KING
65. FAIR SHARE RESEARCH AND EDUCATION FUND
66. FALMOUTH LINC
67. FAITHFUL SAVIOR MINISTRIES
68. FAMILY SERVICES FIRST OF GRANT COUNTY, INC.
69. FARCONI ANEMNA RESEARCH FUND INC.
70. FARMWORKER HOUSING SVC CORP
71. FIRST CHURCH OF THE NAZARENE
72. FIRST UNITARIAN CHURCH
73. FORD FAMILY FOUNDATION
74. FOUNDATIONS FOR A BETTER OREGON
75. FOUNTAINS UP THE CHILDREN
76. GATEWAY TO COLLEGE NATIONAL NETWORK
77. GOAL ONE COALITION
78. GOLD BEACH POLICE DEPARTMENT
79. GOOD SHEPHERD COMMUNITIES
80. GOODWILL INDUSTRIES OF LANE AND SOUTHERN COUNTIES
81. GRANT PARK CHURCH
82. GRANTS PASS MANAGEMENT SERVICES, DBA
83. GREATER HILLSBORO AREA CHAMBER OF COMMERCE
84. HAYWARD HOUSE SERVICES, INC.
85. HEARING & SPEECH INSTITUTE INC
86. HELP NOW! ADVOCACY CENTER
87. HIGHLAND HAVEN